

INVESTMENT FORUM AGENDA
WEDNESDAY, APRIL 13, 2022, 11:50AM

We will meet for the Spring Term as a “hybrid” class, at 11:50AM. You may attend in person in TA-1, or by Zoom. To attend in person, you must download your proof of vaccination and take the daily health questionnaire to visit the Mason campus.

Parking is available in front of Tallwood, or in the pool parking lot next to Tallwood.

The Zoom meeting link and ID, and the daily health screen to come on the Mason campus, will be in the Daily Schedule, which will be forwarded by OLLI on Wednesday morning.

The Zoom Meeting ID is: 85936541391, Passcode: 903778

Survey on in-person a Zoom meeting Forum intentions. We will take a survey on your intentions to attend the Forum, in-person, some in-person/ some Zoom, or only Zoom.

Markets.

Another down week, with the DOW down 0.3%; the S&P down 1.3%; the NASDAQ down 3.9%; and the Russell 2000 down 4.6%. The Fed meeting, and certainty of tighter money, and reducing the Fed’s \$9 trillion bond portfolio by \$1 trillion per year, and falling bond prices, I drove markets.

Topics this week.

The week that was. We will lead off our discussions with recent market moves. I will comment on the near certain Russian sovereign debt default.

Forum leadership will have some walk-on topics to discuss.

Business Development Companies. David Toms will update us on BDCs, and how they have performed in the last year.

Bob Baker will look at the buys and sells.

Upcoming topics

REITs. On April 20, Bob Baker will update us on REITs.

Pharma Phillip Crooker (Tom's son) will talk about the pharma sector on May 18.

My Investor Journey. Over the years, a number of Forum members have given 10 to 15 minute presentations, "My Investor Journey." When they became investors. What they bought then. How their investment choices have evolved over time. Funds or individual investments. Investment goals. Allocations. What financial press you read. Use of advisors. Favorite investment services or websites. How much time you spend following the market. War stories. If you are willing to give such a talk, please let me know and we will schedule you. I will lead this off with my investor journey in the next few weeks.

Other

Investment Forum Website.

The Investment Forum website may be accessed at <https://olli.gmu.edu/>, then pressing the "Clubs & Activities" link in the center of the OLLI home page, followed by the "Inve\$tment Forum" link on the dropdown list. Please contact Jim Coile, the Webmaster with any presentation contributions, article suggestion, or improvements by email, ctj444@icloud.com The website has current and past agendas and buy/sell lists and other presentations.

Al Smuzynski
Investment Forum Moderator
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Symbol	Description	Sector	Industry	Market Cap	P/E (ttm)	Ex-Date	Dividend Yield	Dividend
▼ BUY: 04/04 - 04/08								
VTIP	Vanguard Short Inflation	--	--	20.08B	--	04/01/20	5.52	2.80
T	A T & T Inc	Communication Services	Diversified Telecommunication Services	172.92B	8.69	04/13/20	4.60	1.11
EVGO	Evgo Inc	Consumer Discretionary	Specialty Retail	857.87M	--	--	--	--
BRK/B	Berkshire Hathaway	Financials	Diversified Financial Services	779.84B	8.69	--	--	--
BX	Blackstone Inc	Financials	Capital Markets	80.52B	14.54	02/04/20	5.04	5.80
BAX	Baxter Interntnl	Health Care	Health Care Equipment & Supplies	40.26B	30.43	02/24/20	1.40	1.12
FCEL	Fuelcell Energy Inc	Industrials	Electrical Equipment	1.98B	--	--	--	--
CTRE	Caretrust Reit Inc	Real Estate	Equity Real Estate Investment Trusts (REITs)	1.82B	25.86	03/30/20	5.87	1.10
SPG	Simon Pty Group	Real Estate	Equity Real Estate Investment Trusts (REITs)	41.85B	18.70	03/09/20	5.18	6.60
▼ SELL: 04/04 - 04/08								
FSPHX	Fidelity Select Health Care	--	--	--	--	--	--	--
MWTSX	Metropolitan West Total Return Bd Plan	--	--	--	--	--	--	--
XBI	Spdr S&P Biotech Etf	--	--	6.76B	--	03/22/20	--	--
TGT	Target Corp	Consumer Discretionary	Multiline Retail	107.90B	15.31	05/17/20	1.54	3.60
PAYX	Paychex Inc	Information Technology	IT Services	50.29B	37.76	01/28/20	2.09	2.64
▼ THINKING ABOUT: 04/04 - 04/08								

Also sold: 400 bu soybeans in storage.