

INVESTMENT FORUM AGENDA  
WEDNESDAY, MAY 11, 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. The daily health questionnaire to visit the Mason campus is no longer required.

New OLLI name tags with a QR code are available in TA-1 when you next come to an in-person session. These can be scanned to sign in to in-person classes.

The Zoom meeting link and ID will be in the Daily Schedule, which will be forwarded by OLLI on Wednesday morning.

The Zoom Meeting ID is: 85936541391, Passcode: 903778

The OLLI board elections are underway, and end May 20. Be sure to vote!

I will resume sending out the agenda on Sunday evenings on May 15.

Markets.

Another bad week, with the DOW and S&P down 0.2%, and the NASDAQ down 1.5%. The sell-off continued yesterday, and again today after opening higher. The markets looks like it just wants to go down, and a bear market is near. What to do? Most of us have experienced this before, several times, so this ain't our first rodeo. The big names that have been winners the past few years - Netflix, Amazon, ARK funds/Cathie Wood, Bitcoin, growth stocks, are now the big losers. “Buying the dip” now looks more like catching the falling knife.

Poll results from last week

Ride it out - 62%

Buy the dip/look for bargains - 24%

Significant reallocation to less risk - 12%

Minor trimming and reallocations - 29%

## Topics this week.

The week that was. We will lead off our discussions with recent market moves.

Mid-term bond funds. I will take a look at some mid-term bond funds (durations of 5-10 year.)

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

Bob Baker will look at the buys and sells.

## Upcoming topics

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

## 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 "Investment 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](mailto:ctj444@icloud.com) The website has current and past agendas and buy/sell lists and other presentations.

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Investment Forum Moderator  
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# Buy/Sell list – week ending 05/06/22

Symbol	Description	Sector	Industry	Market Cap	P/E (ttm)	Ex-Date	Dividend Yield	Dividend
<b>▼ BUY: 5/2 - 5/6</b>								
<b>T</b>	A T & T Inc	Communication Services	Diversified Telecommunication Services	143.39B	8.39	04/13/20	5.53	1.11
<b>VZ</b>	Verizon Communicatn	Communication Services	Diversified Telecommunication Services	202.72B	9.42	04/07/20	5.31	2.56
<b>BAC</b>	Bank Of America Corp	Financials	Banks	301.73B	10.99	06/02/20	2.25	0.84
<b>MAIN</b>	Main Street Capital	Financials	Capital Markets	2.91B	8.58	06/01/20	6.31	2.58
<b>CRL</b>	Charles River Labs	Health Care	Life Sciences Tools & Services	12.29B	30.62	--	--	--
<b>HON</b>	Honeywell Intl Inc	Industrials	Industrial Conglomerates	133.04B	27.37	05/12/20	2.01	3.92
<b>MMM</b>	3M Co	Industrials	Industrial Conglomerates	85.09B	16.05	02/17/20	3.99	5.96
<b>UPS</b>	United Parcel Srvc Cl B	Industrials	Air Freight & Logistics	157.21B	15.01	05/13/20	3.38	6.08
<b>CTSH</b>	Cognizant Tech Solu Cl A	Information Technology	IT Services	39.36B	20.23	05/19/20	1.47	1.08
<b>MSFT</b>	Microsoft Corp	Information Technology	Software	2,054.71B	30.27	05/18/20	0.90	2.48
<b>GLPI</b>	Gaming & Leisure Ppt	Real Estate	Equity Real Estate Investment Trusts (REITs)	11.00B	20.85	03/10/20	6.24	2.76
<b>▼ SELL: 5/2 - 5/6</b>								
<b>KO</b>	The Coca-Cola Co	Consumer Staples	Beverages	280.65B	27.44	06/14/20	2.72	1.76
<b>SAM</b>	Boston Beer Co Inc Cl A	Consumer Staples	Beverages	4.54B	--	--	--	--
<b>XOM</b>	Exxon Mobil Corp	Energy	Oil, Gas & Consumable Fuels	386.25B	15.23	05/12/20	3.84	3.52
<b>▼ THINKING ABOUT: 5/2 - 5/6</b>								