

INVESTMENT FORUM AGENDA
WEDNESDAY, JUNE 1, 2022, 10:30AM

We will meet at 10:30AM this week. You may attend in person in TA-3, or by Zoom.

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.

Registration for the Summer Term began May 23, and ends June 1.

Markets.

Finally, and up week. For the week, the DOW was up 6.2%; the S&P was up 6.6%; the NASDAQ was up 6.8%; and the Russell 2000 was up 6.5%. Did the markets find a bottom the week before? Or is this a “dead cat bounce?”

Topics this week.

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

My Investor Journey. I will discuss how I have evolved over the past 40 years as an investor. My investor goals, what I buy, diversification and allocations, how often I trade, and sources for information and ideas. We have done similar presentations over the years, and I hope others will follow up with their stories.

“Buy the Dip and other Tips for Retirement Investors.” This is an article in this week’s *Barron’s*. It suggests: focus on fundamentals; buying the dips; selecting investments. We have tried to generate a discussion using polls, with mixed success. We will open it up, inviting your comments on what you are doing (if anything) in response to the dip this year.

Bob Baker will look at the buys and sells from this week, and also from the previous week that we did not cover last week.

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
asmuzynski@verizon.net

Buy/Sell list – week ending 05/27/22

Symbol	Description	Sector	Industry	Market Cap	P/E (ttm)	Ex-Date	Dividend Yield	Dividend
▼ BUY: 05/23 - 05/27								
AMZN	Amazon.Com Inc	Consumer Discretionary	Internet & Direct Marketing Retail	1,171.55B	51.22	--	--	--
TGT	Target Corp	Consumer Discretionary	Multiline Retail	77.50B	12.92	05/17/20	2.15	3.60
WMT	Walmart Inc	Consumer Staples	Food & Staples Retailing	353.68B	26.54	08/11/20	1.74	2.24
WMB	Williams Cos Inc	Energy	Oil, Gas & Consumable Fuels	45.63B	30.57	06/09/20	4.52	1.70
ABR	Arbor Realty Tr	Financials	Mortgage Real Estate Investment Trusts (REITs)	2.66B	7.63	05/19/20	9.09	1.52
ARCC	Ares Capital Corp	Financials	Capital Markets	9.79B	6.29	06/14/20	8.45	1.68
MAIN	Main Street Capital	Financials	Capital Markets	2.80B	7.62	06/01/20	6.58	2.58
TSLX	Sixth Street Specialty L	Financials	Capital Markets	1.61B	7.98	06/14/20	9.01	1.86
OHI	Omega Hlthcare Invts	Real Estate	Equity Real Estate Investment Trusts (REITs)	6.97B	15.95	04/29/20	9.05	2.68
PNW	Pinnacle West Cap	Utilities	Electric Utilities	8.90B	14.68	04/29/20	4.32	3.40
▼ SELL: 05/23 - 05/27								
JPC	Nuveen Preferred Income	--	--	864.67M	15.17	05/12/20	7.78	0.64
XOM	Exxon Mobil Corp	Energy	Oil, Gas & Consumable Fuels	411.10B	15.97	05/12/20	3.60	3.52
BMJ	Bristol-Myers Squibb	Health Care	Pharmaceuticals	162.11B	27.37	03/31/20	2.83	2.16
LMT	Lockheed Martin Corp	Industrials	Aerospace & Defense	120.09B	19.80	05/31/20	2.48	11.20
AVGO	Broadcom Inc	Information Technology	Semiconductors & Semiconductor Equipment	245.79B	26.34	06/21/20	2.80	16.40
▼ THINKING ABOUT: 05/23 - 05/27								