

INVESTMENT FORUM AGENDA
WEDNESDAY, SEPTEMBER 7, 2022, 10:30AM

We meet as a “club” until the start of the Fall term September 21.

You may attend in person in TA-1, or by Zoom. The Zoom meeting link and ID will be in the Daily Schedule, which will be forwarded by OLLI on Wednesday morning.

Markets.

A third week of losses, with the DOW down 3.0%; the S&P down 3.3%; the NASDAQ down 4.2%; and the Russell 2000 down 4.7%. The NASDAQ is back in a bear market this year, and markets were down 4.2% in August. Despite continued strong jobs’ numbers, which will make it more difficult for the Fed to bring down inflation. What is normally good news (good jobs’ creation) is bad news. Interest rates continue to rise, especially short-term interest rates, but gasoline prices have eased.

Topics this week.

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

Bob Baker will look at our trades for the past two weeks

Future topics

My Investor Journey. Bob Baker - 9/14. Bob Shaffer - 10/12. Sy Sherman - 10/19. Lou Coglianesse - 10/26. Ray Willson, Paul Howard, and Joe

Androsky will be scheduled over the next few months. Please let me know if you are willing to share your journey as an investor.

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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Buy/Sell list – week ending 09/02/22

Symbol	Description	Sector	Industry	Market Cap	P/E (ttm)	Ex-Date	Dividend Yield	Dividend	Last Trade	% Chg frm 52 Wk High
▼ BUY: 08/29 - 09/02										
SCHD	Schwab Us Dividend	--	--	31.87B	--	06/22/2022	3.37	2.43	72.03	-12.66
VZ	Verizon Communicatn	Communication Services	Diversified Telecommunication Services	175.59B	8.54	07/07/2022	6.20	2.56	41.30	-25.60
F	Ford Motor Co	Consumer Discretionary	Automobiles	61.07B	5.33	08/10/2022	3.95	0.60	15.18	-41.32
SBUX	Starbucks Corp	Consumer Discretionary	Hotels Restaurants & Leisure	95.17B	23.41	08/11/2022	2.36	1.96	83.15	-31.14
PXD	Pioneer Natural Res	Energy	Oil, Gas & Consumable Fuels	59.14B	10.55	09/02/2022	4.87	11.87	243.50	-15.59
BAC	Bank Of America Corp	Financials	Banks	268.94B	10.65	09/01/2022	2.63	0.88	33.48	-33.19
CFG	Citizens Finl Group Inc	Financials	Banks	17.93B	9.42	08/01/2022	4.62	1.68	36.39	-36.16
MS	Morgan Stanley	Financials	Capital Markets	147.94B	11.39	07/28/2022	3.58	3.10	86.60	-21.08
JCI	Johnson Controls Inter F	Industrials	Building Products	37.81B	36.84	06/17/2022	2.55	1.40	54.89	-32.87
ADI	Analog Devices Inc	Information Technology	Semiconductors & Semiconductor Equipment	77.51B	41.77	08/29/2022	2.05	3.04	148.63	-22.57
GLW	Corning Inc	Information Technology	Electronic Equipment, Instruments & Components	28.02B	14.88	08/30/2022	3.23	1.08	33.47	-23.00
INTC	Intel Corp	Information Technology	Semiconductors & Semiconductor Equipment	130.41B	6.93	08/04/2022	4.67	1.46	31.23	-44.51
▼ SELL: 08/29 - 09/02										
VZ	Verizon Communicatn	Communication Services	Diversified Telecommunication Services	175.59B	8.54	07/07/2022	6.20	2.56	41.30	-25.60
GIS	General Mills Inc	Consumer Staples	Food Products	45.70B	17.42	07/07/2022	2.79	2.16	77.42	-1.41
PEP	Pepsico Inc	Consumer Staples	Beverages	238.52B	26.05	09/01/2022	2.69	4.60	170.75	-5.70
AZN	Astrazeneca Plc F	Health Care	Pharmaceuticals	190.43B	--	08/11/2022	2.39	1.45	60.76	-15.26
CAH	Cardinal Health Inc	Health Care	Health Care Providers & Services	19.35B	--	09/30/2022	2.79	1.98	70.99	-1.78
BE	Bloom Energy Corp	Industrials	Electrical Equipment	4.59B	--	--	--	--	23.70	-35.96
PLUG	Plug Power Inc	Industrials	Electrical Equipment	15.61B	--	--	--	--	25.90	-44.30
AAPL	Apple Inc	Information Technology	Technology, Hardware, Storage & Peripherals	2,538.54B	26.30	08/05/2022	0.59	0.92	155.65	-14.92
WRAP	Wrap Technologies Inc	Information Technology	Electronic Equipment, Instruments & Components	80.11M	--	--	--	--	1.88	-74.18
NEE	Nextera Energy Inc	Utilities	Electric Utilities	167.22B	65.91	08/29/2022	1.98	1.70	85.92	-8.33
▼ THINKINGABOUT: 08/29 - 09/02										