

INVESTMENT FORUM AGENDA
WEDNESDAY, MAY 31, 2023, 10:30AM

We are meeting “hybrid,” in person in Tallwood TA-1 and by Zoom. The Zoom meeting link and ID will be in the Daily Schedule, which will be forwarded by OLLI on Wednesday morning. Whether you registered for on-line participation by Zoom or in-person, you are welcome to join us in person in TA-1.

The OLLI Summer Catalogue is out. Registration for the Summer Session began on May 17. Please register for the Investment Forum Summer Term, both the class and the “club” sessions.

Markets.

As I write this (Sunday afternoon) President Biden and Speaker McCarthy have reached agreement “in principal” on a new debt ceiling to 2025. Will it pass both the House and the Senate? Let’s hope so, and we will not have to worry about this nonsense for two years.

In other news . . . markets were mixed last week, with the DOW down 1.0%; the S&P up 0.3%; the NASDAQ up 2.5%; and the Russell 2000 even. The big news was NVIDIA (NVDA) which was up bigly (and now approaching \$1 trillion market cap) and seems to be an AI beneficiary.

Topics this week

The week that was. We will look at the latest economics indicators that are driving markets, and then we will look for your comments on what was important the past week.

Buys and Sells. Bob Baker will look at buys and sells from last week.

Government Bond Funds. I will look at a few of these. Treasury Bond funds, of different durations, and mortgage backed securities. No credit risk here (uh . . . the debt ceiling?) but certainly price volatility from interest rate changes.

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.

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Investment Forum Moderator
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Buy/Sell List – week ending 05/26/23

Symbol	Description	Sector	Industry	Market Cap	P/E (ttm)	Ex-Date	Dividend Yield	Dividend	Last Trade	% Change	% Chg frm 52 Wk High
▼ BUY: 05/22 - 05/26											
KBE	Spdr S&P Bank Etf	--	--	1.21B	--	03/20/2023	3.63	1.27	35.01	+1.10	-33.35
SWVXX	Schwab Value Advantage Money	--	--	--	--	--	--	--	--	--	--
CMCSA	Comcast Corporation Cl A	Communication Services	Media	164.59B	30.75	07/03/2023	2.92	1.16	39.66	+1.00	-11.20
VZ	Verizon Communicatn	Communication Services	Diversified Telecommunication Services	146.38B	6.99	04/06/2023	7.45	2.61	35.02	+0.52	-32.90
CSWC	Capital Southwest Corp	Financials	Capital Markets	677.17M	16.65	06/14/2023	12.13	2.26	18.63	+1.49	-18.79
MRVL	Marvell Technology Inc	Information Technology	Semiconductors & Semiconductor Equip	56.28B	--	04/05/2023	0.36	0.24	67.34	+32.42	--
▼ SELL: 05/22 - 05/26											
DIS	Walt Disney Co	Communication Services	Entertainment	161.06B	39.58	12/13/2019	--	--	88.45	+0.17	-30.07
EVGO	Evgo Inc	Consumer Discretionary	Specialty Retail	377.58M	--	--	--	--	3.72	-4.15	-70.59
FCEL	Fuelcell Energy Inc	Industrials	Electrical Equipment	823.64M	--	--	--	--	2.02	-0.98	-63.27
PWR	Quanta Services Inc	Industrials	Construction & Engineering	25.26B	49.14	06/30/2023	0.18	0.32	173.43	+0.67	-1.66
▼ THINKING ABOUT: 05/22 - 05/26											
WTAI	Wisdomtree Art Intl And	--	--	28.06M	--	12/23/2022	0.17	0.03	18.10	+3.31	-0.44
NVDA	Nvidia Corp	Information Technology	Semiconductors & Semiconductor Equip	939.30B	159.40	06/07/2023	0.04	0.16	390.28	+2.54	-1.14
TSM	Taiwan Semiconductr F	Information Technology	Semiconductors & Semiconductor Equip	456.59B	13.34	06/15/2023	1.74	1.79	103.17	+2.24	-3.06

- 4.450% 5 yr CD (Schwab)
- 4.550% 4 yr CD (Schwab)
- 5.318% 6 mo CD (Schwab)