

INVESTMENT FORUM AGENDA
WEDNESDAY, APRIL 3, 2024, 11:50AM

First, let me again welcome our new members, especially all of you who introduced yourselves last week. You have much to share with us, and we look forward to hearing your views. If you are new or newish and did not introduce yourself last week, I will invite you to do so this week.

We are meeting “hybrid,” in person in Tallwood TA-1 and by Zoom, at 11:50AM, for the OLLI Spring Term. The Zoom meeting link and ID will be in the Daily Schedule, which will be forwarded by OLLI on Wednesday mornings. Whether you registered for on-line participation by Zoom or in-person, you are welcome to join us in person in TA-1.

Markets.

Another week, and new all-time highs in most averages. (The same first sentence as last week.) Who needs the Investment Forum? Throw darts at a list of stocks, and you will make money! Said in jest, of course. We have all been through bear markets . . .

For the week, the DOW was up 0.8%; the S&P was up 0.4%, the NASDAQ was down 0.3%; and the Russell 2000 was up 2.5%. The important news was on Friday, when markets were closed. The “PCE, ” or Personal Consumption Expenditures, the Fed’s favored inflation measure, was announced for February rising at a 2.8% annual rate. The expected number, but still higher than the Fed’s target, and signaling that 3 rate cuts in 2024 may be high. If we want to nerd out, somebody can ‘splain to us the difference between PCE and the more familiar CPI - Consumer Price Index.

Topics this week.

The week that was. Garrett Ruhl will look at new and important numbers, as we look ahead to a favorable economy.

Finviz. Bob Baker will look again at his favorite stock screen website, Finviiz, and what it can do.

Buys, Sells, and Thinking Abouts. Bob Baker will go over the buys and sells, from the last week.

Future Topics

Bitcoin. I am looking for members who own crypto (Bitcoin or others) and are willing to talk about them and the new Bitcoin ETFs.

DOW 40,000 Sheet Cake. For many years, the Forum celebrated new, 1,000 point gains in the Dow Jones Averages, with a sheet cake, provided by long-time member Ed Swoboda. This tradition worked with in-person sessions, but faded with Covid and Zoom sessions. We will bring it back, on April 10, (or a later day, as plans are slow firming up) with a sheet cake or cup cakes, in TA-1. Plan to attend in person that day (we will still be hybrid, on Zoom) to enjoy a sugar high that day and meet and greet fellow Forum members, who you may not have seen in-person for years. (If the DOW does not close above 40,000 by then, we will celebrate DOW 39,000.)

Other

Garrett Ruhl's comments. Garrett follows economic news closely and sends out observations on significant economic news by email several times a week. You can contact him, at gairoak@aol.com to be put on his email distribution list.

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 presentations.

Al Smuzynski
Investment Forum Moderator
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Buy, Sell, Thinking About: w/e 03/29/24

BUY		BUY	
Parnassus Core Equity Fund – Inv (PRBLX) [+]			
iShares Semiconductor ETF (SOXX)			
Verizon Communications Inc. (VZ) [+]			
Arbor Realty Trust, Inc. (ABR) [+]			
Hercules Capital, Inc. (HTGC) [+]		SELL	
Agree Realty Corp. (ADC) [+]			
Gaming and Leisure Properties Inc. (GLPI) [+]			
Realty Income (O) [+]			
		THINKING ABOUT	
			WisdomTree WTI Crude Oil 2x Daily Leveraged ETC (LOIL)
			Eli Lilly and Co. (LLY)
			Pfizer, Inc. (PFE)
			Microsoft Corp. (MSFT)

Buy, Sell, Thinking About: w/e 03/29/24

Symbol	Description	Sector	Industry	Ex-Date	Market Cap	P/E (ttm)	Dividend Yield	Dividend Amount	Last Trade	% Change	% Chg frm 52 Wk High	% Chg frm 52 Wk Low
▼ BUY: 03/25 - 03/28												
PRBLX	Parnassus Core Equity Investor	--	--	--	--	--	--	--	60.55	-0.03	-0.05	+23.60
SOXX	Ishares S&P N Amer Semi-Con	--	--	03/21/2024	12.82B	4.26	0.61	1.37	225.32	+0.11	-6.12	+71.31
VZ	Verizon Communicatn	Communication Services	Diversified Telecommunication Services	04/09/2024	176.65B	14.85	6.35	2.66	41.89	+1.01	-3.05	+38.98
ABR	Arbor Realty Tr	Financials	Mortgage Real Estate Investment Trusts (REITs)	03/01/2024	2.50B	7.32	12.98	1.72	13.25	-1.05	-25.31	+31.19
HTGC	Hercules Capital Inc	Financials	Capital Markets	02/27/2024	2.89B	7.89	10.38	1.92	18.50	+0.44	-2.01	+53.40
ADC	Agree Realty Corp	Real Estate	Retail REITs	03/27/2024	5.73B	32.94	5.16	2.96	57.41	+0.78	-17.11	+8.96
GLPI	Gaming & Leisure Ppt	Real Estate	Specialized REITs	03/14/2024	12.51B	16.31	6.68	3.04	45.49	+0.66	-13.28	+4.47
O	Realty Income Corp	Real Estate	Retail REITs	03/28/2024	46.59B	41.75	5.69	3.08	54.13	+1.10	-15.66	+20.21
▼ SELL: 03/25 - 03/28												
▼ THINKING ABOUT: 03/25 - 03/28												
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LLY	Eli Lilly And Co	Health Care	Pharmaceuticals	02/14/2024	700.76B	133.60	0.67	5.20	776.50	-0.03	-3.03	+127.92
PFE	Pfizer Inc	Health Care	Pharmaceuticals	01/25/2024	157.14B	74.57	6.05	1.68	27.77	-0.11	-34.23	+8.43
MSFT	Microsoft Corp	Information Technology	Software	05/15/2024	3,126.13B	38.12	0.71	3.00	420.01	-0.17	-2.51	+52.52

Buy, Sell, Thinking About: w/e 03/29/24

