

INVESTMENT FORUM AGENDA
WEDNESDAY, SEPTEMBER 11, 2024, **10:30AM**

We will be meeting this Wednesday, at 10:30AM, hybrid, as a “club,” until the beginning of the Fall Term, which begins September 25. The Zoom meeting link and ID will be in the Daily Schedule, which will be forwarded by OLLI on Wednesday mornings. If you have not registered for the “club” Summer term sessions, you will not get the the Daily Schedule, which has the Zoom links. If you do not get the Daily Schedule.

Zoom Meeting ID: 827 9411 7490
Passcode: 816877

Registration for the Fall Term began August 20 and continues. Be sure to register for both the Forum Fall term, and the Forum Fall club sessions.

Markets.

Do we need to visit the Wailing Wall to mourn our losses last week? For the week, the DOW 2.9%; the S&P was down 4.3%; the NASDAQ was down 5.8%, and the Russell 2000 was down 5.7%. On fears that the economy is cooling and softening in the jobs' market, although the numbers did not look that bad to me.

Topics This Week.

The week that was. Garrett Ruhl will look at new and important economic numbers from the past week, and upcoming economic releases.

Financial Advisors. Vivien Szu Tu will discuss her search for an advisor and what she was looking for.

Retirement withdrawals. An article in this week's Barron's, “Retirees, It's Time to Give Yourself a Raise,” says that a 5% withdrawal rate, rather than 4%, can be safe. And it suggests portfolio allocations. The article is posted on the Forum website.

Buys, Sells, and Thinking Abouts. Bob Baker will look at your buys and sells for the past week.

Future Topics

Financial Advisors and Wealth Managers. I am scheduling several of you who use or have shopped for Financial Advisors, to talk about your experiences.

Al Brueckman - September 18.
Jerry Schragger - October 2
Zach Teich - October 9
Tom Crooker - TBA
Joe Andrikcosky - October er 16

I am still looking to hear from more of you, who use such services. Just a five to ten minute talk, with questions and comments Let me know if you are interested in talking on Zoom.

Mason Student-Managed Investment Fund. On November 20, we will again be joined by Professor Derek Horstmeyer and leaders of the SMIF, to update us on their current stock picks, performance of their fund, and observations on the markets. The SMIF will also give a two session OLLI course on November 6 and November 14.

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 09/06/24

BUY		SELL	
JPMorgan Nasdaq Eqty Prem ETF (JEPQ) [+]		RTX Corp. (RTX) [-]	
Verizon Communications, Inc. (VZ) [+]			
BP plc ADR (BP)			
Apple, Inc. (AAPL) [+]			
5.4% Zion bank CD			
		THINKING ABOUT	
		Berkshire Hathaway Inc. (BRK/B)	

Buy, Sell, Thinking About: w/e 09/06/24

Symbol	Description	Sector	Industry	Market Cap	P/E (ttm)	Ex-Date	Dividend Yield	Dividend	Last Trade	% Change	% Chg frm 52 Wk High
▼ BUY: 09/02 - 09/06											
JEPQ	J P Morgan Nasdaq Eq	--	--	15.27B	--	09/03/2024	9.87	5.08	51.47	-1.95	-8.39
VZ	Verizon Communicatn	Communication Services	Diversified Telecommunication Services	173.22B	15.58	10/10/2024	6.59	2.71	41.14	-0.39	-5.25
BP	Bp Plc F	Energy	Oil, Gas & Consumable Fuels	85.42B	12.74	08/09/2024	5.61	1.79	31.89	-1.39	-21.91
AAPL	Apple Inc	Information Technology	Technology, Hardware, Storage & Peripherals	3,357.38B	33.63	08/12/2024	0.45	1.00	220.12	-0.70	-7.21
▼ SELL: 09/02 - 09/06											
RTX	Rtx Corp	Industrials	Aerospace & Defense	157.30B	73.03	08/16/2024	2.13	2.52	118.50	-1.00	-4.20
▼ THINKING ABOUT: 09/02 - 09/06											
BRK/B	Berkshire Hathaway	Financials	Financial Services	990.16B	15.20	--	--	--	459.20	-1.18	-5.28

CD:

- 5.4% Zion bank CD

Buy, Sell, Thinking About: w/e 09/06/24

