

INVESTMENT FORUM AGENDA  
WEDNESDAY, SEPTEMBER 18, 2024, **10:30AM**

We will be meeting this Wednesday, at 10:30AM, hybrid, as a “club,” We will begin meeting Wednesday, September 25, at 11:50AM for the first session of the regular OLLI Fall Term. The Zoom meeting link and ID will be in the Daily Schedule, which will be forwarded by OLLI on Wednesday mornings. If you do not get the Daily Schedule.

Zoom Meeting ID: 827 9411 7490

Passcode: 816877

Markets.

Whiplash? Following the worst week in years, we had the best week in 2024. For the week, the DOW was up 2.6%; the S&P was up 4.0%; the NASDAQ was up 6.0%; and the Russell 2000 was up 4.4%. All indexes are near their all time highs. I did not see economic news much different than the previous week, when markets swooned. Go figure.

When we meet, we should know the Fed’s decision on lowering rates. It is 50-50 whether we will have a 1/4% or 1/2% drop.

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. Al Brueckman will go over his hunt for a financial advisor, who he chose and why.

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 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 "Investment 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](mailto: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 09/13/24

BUY	SELL
iShares S&P 500 Value ETF (IVE)	T. Rowe Price Value Fund (TRVLX) [C]
Alphabet Inc. (GOOGL) [+]	SELL TO OPEN PUTS
Verizon Communications, Inc. (VZ) [+]	<ul style="list-style-type: none"> <li>• AAPL \$220 Strike, Expires 12/19/2025</li> </ul>
Tesla, Inc. (TSLA)	<ul style="list-style-type: none"> <li>• NVDA \$105 Strike, Expires 01/16/2026</li> </ul>
Ares Capital Corp. (ARCC) [+]	<ul style="list-style-type: none"> <li>• NVDA \$119 Strike, Expires 12/18/2026</li> </ul>
JPMorgan Chase & Co. (JPM) [+]	SELL TO OPEN CALL
Sixth Street Specialty Lending, Inc. (TSLX) [+]	<ul style="list-style-type: none"> <li>• TSLA \$245 Strike, Expires 11/01/2024</li> </ul>
Apple, Inc. (AAPL) [+]	
Nvidia Corp. (NVDA) [+]	<b>THINKING ABOUT</b>
Palantir Technologies Inc (PLTR)	Corebridge Financial, Inc. (CRBG)
BUY TO OPEN CALLS	
<ul style="list-style-type: none"> <li>• AMZN \$160 Strike, Expires 12/19/2025</li> </ul>	
<ul style="list-style-type: none"> <li>• NVDA \$100 Strike, Expires 12/19/2025</li> </ul>	

# Buy, Sell, Thinking About: w/e 09/13/24

Symbol	Description	Sector	Industry	Market Cap	P/E (ttm)	Ex-Date	Dividend Yield	Dividend	Last Trade	% Change	% Chg frm 52 Wk High
<b>▼ BUY: 09/09 - 09/13</b>											
IVE	Ishares S&P 500 Value	--	--	34.82B	5.52	06/11/2024	1.71	3.32	194.26	+0.60	-1.07
GOOGL	Alphabet Inc Class A	Communication Services	Interactive Media & Services	1,943.41B	21.34	09/09/2024	0.51	0.80	157.24	+1.79	-18.00
VZ	Verizon Communications	Communication Services	Diversified Telecommunication Services	184.38B	16.40	10/10/2024	6.10	2.71	44.46	+1.30	-0.03
TSLA	Tesla Inc	Consumer Discretionary	Automobiles	728.79B	63.59	--	--	--	230.09	+0.21	-17.52
ARCC	Ares Cap Corp	Financials	Capital Markets	12.84B	7.23	09/13/2024	9.42	1.92	20.39	-1.50	-6.64
JPM	Jpmorgan Chase & Co	Financials	Banks	589.60B	11.47	07/05/2024	2.25	4.60	204.29	-1.10	-9.40
TSLX	Sixth Street Specialty L	Financials	Capital Markets	1.99B	8.91	09/16/2024	9.53	2.04	21.40	+0.71	-4.25
AAPL	Apple Inc	Information Technology	Technology, Hardware, Storage & Peripherals	3,385.35B	33.52	08/12/2024	0.45	1.00	222.25	-0.12	-6.31
NVDA	Nvidia Corp	Information Technology	Semiconductors & Semiconductor Equipment	2,921.52B	50.69	09/12/2024	0.03	0.04	118.76	-0.03	-15.63
PLTR	Palantir Technologies In	Information Technology	Software	79.70B	205.15	--	--	--	35.73	+1.95	-0.78
<b>▼ SELL: 09/09 - 09/13</b>											
TRVLX	T. Rowe Price Value	--	--	--	--	--	--	--	48.60	+0.70	-1.74
<b>▼ THINKING ABOUT: 09/09 - 09/13</b>											
CRBG	Corebridge Finl Inc	Financials	Financial Services	16.23B	8.22	09/16/2024	3.18	0.92	28.90	-0.36	-16.62

## OPTIONS:

### SELL TO OPEN PUTS

- AAPL \$220 Strike, Expires 12/19/2025
- NVDA \$105 Strike, Expires 01/16/2026
- NVDA \$119 Strike, Expires 12/18/2026

### SELL TO OPEN CALL

- TSLA \$245 Strike, Expires 11/01/2024

### BUY TO OPEN CALLS

- AMZN \$160 Strike, Expires 12/19/2025
- NVDA \$100 Strike, Expires 12/19/2025

# Buy, Sell, Thinking About: w/e 09/13/24

