

INVESTMENT FORUM AGENDA  
WEDNESDAY, FEBRUARY 26, 2025  
TALLWOOD TA-1, 10:30AM, and Zoom

Registration for classes began on February 18. Be sure to register for the Investment Forum classes, either in-person or Zoom, and for the Spring “club” sessions, which is a separate registration process on the OLLI website.

The Zoom meeting link and ID will be in the Daily Schedule, which will be forwarded by OLLI on Wednesday morning. Regardless whether you registered for in-person or Zoom, you are welcome to join us in-person in Tallwood, TA-1.

**Markets.**

A down week, with the S&P down 1.7%; the NASDAQ down 2.5%; and the Russell 2000 down 3.7%. Drivers were stubborn inflation numbers, continued tariff threats, political uncertainty, and slowing consumer spending and sentiment, with the retail sector ETF (XRT) down 5.7% for the week.

**Topics This Week.**

The Week that Was. David Toms will look at important numbers and market indicators.

Buys, Sells, and Thinking Abouts. Bob Baker will look at the Buys and Sells, and Thinking Abouts.

**Future Topics**

Panel Discussions. I am still looking to fill out panels discussions on three topics:

Growth and Momentum Investing vs. Dividend and Value Investing. Charles Murphy will join the growth side; I am looking for others. Several of

you have volunteered for this discussion, but I have lost the list. Please email me again if you are willing to participate.

Robo investing services. Periodically over the years, we have followed evolution of robo-investing services offered by brokerage firms. If you use such services (Fidelity Go, Schwab Intelligent Portfolio, and Vanguard Digital Advisor are big ones) please let me know; I would like to schedule your comments on your experiences with the services.

Gold. We haven't talked much about gold over the years, but given gold's rise, I would like to discuss. If you own gold, via an ETF, or gold miners, or bullion (does anybody really do that?) and are willing to share your experience, please let me know.

### **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](mailto:ctj444@icloud.com) The website has current and past agendas and buy/sell lists and presentations.

Garrett Ruhl's comments. Garrett follows economic news closely and sends out articles and comments on significant economic news by email several times a week, to a distribution list. You can get on his distribution list by contacting him at [gairoak@aol.com](mailto:gairoak@aol.com).

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# Buy, Sell, Thinking About: w/e 02/21/25

BUY		BUY	
AGNC Inv Corp. 9.68% Pfd (AGNCN) [+]		Safran SA (SAFRY)	
Dime Community Bancshares 5.5% Pfd (DCOMP)		Cadence Design Systems, Inc. (CDNS) [+]	
Janus Henderson AAA CLO ETF (JAAA) [+]		Dropbox, Inc. (DBX)	
Alphabet Inc. (GOOGL) [+]		Oracle Corp. (ORCL)	
Yelp Inc. (YELP) [+]		Palantir Technologies Inc (PLTR) [+]	
Cincinnati Financial Corp. (CINF) [+]		BMO Bond, 4.6774% YTM, 09/14/27 Mat	
Federal National Mortgage Assoc'n (FNMA) [+]		Voya Bond, 4.8417% YTM, 06/15/26 Mat	
Nu Holdings Ltd. (NU) [+]			
Upstart Holdings Inc. (UPST) [+]			
Intuitive Surgical Inc. (ISRG) [+]			
Medtronic plc (MDT) [+] [X2]			
Pfizer, Inc. (PFE)			
Old Dominion Freight Line, Inc. (ODFL) [+]			



# Buy, Sell, Thinking About: w/e 02/21/25

Symbol	Description	Sector	Industry	Market Cap	P/E (ttm)	Ex-Date	Dividend Yield	Dividend	Last Trade	% Change	% Chg frm 52 Wk High
▼ BUY: 02/17 - 02/21											
AGNCN	Agnc Invest 9.6802% Pfd	--	--	--	--	12/31/2024	9.98	2.56	25.66	-0.19	-1.61
DCOMP	Dime Community 5.5% Pfd	--	--	--	--	02/06/2025	7.24	1.38	18.98	+0.37	-11.47
JAAA	Janus Henderson Aaa Clo	--	--	21.49B	--	02/03/2025	6.21	3.16	50.87	--	-0.35
GOOGL	Alphabet Inc Class A	Communication Services	Interactive Media & Services	2,200.61B	23.03	03/10/2025	0.45	0.80	179.44	-2.65	-13.33
YELP	Yelp Inc Cl A	Communication Services	Interactive Media & Services	2.35B	20.18	--	--	--	35.72	-2.38	-14.38
CINF	Cincinnati Finl Corp	Financials	Insurance	21.14B	9.39	03/24/2025	2.58	3.48	135.14	-0.46	-16.45
FNMA	Federal Natl Mtg Assn	Financials	Financial Services	41.89B	--	08/14/2008	--	--	7.27	-1.75	-9.13
NU	Nu Hldgs Ltd F	Financials	Banks	52.01B	36.99	--	--	--	10.95	-18.89	-32.16
UPST	Upstart Hldgs Inc	Financials	Consumer Finance	6.73B	--	--	--	--	71.69	-9.39	-25.66
ISRG	Intuitive Surgical Inc	Health Care	Health Care Equipment & Supplies	211.07B	94.78	--	--	--	592.20	-2.44	-3.86
MDT	Medtronic Plc F	Health Care	Health Care Equipment & Supplies	115.42B	26.60	12/27/2024	3.11	2.80	89.90	+2.27	-3.42
PFE	Pfizer Inc	Health Care	Pharmaceuticals	149.04B	18.36	01/24/2025	6.54	1.72	26.28	+1.54	-16.68
ODFL	Old Dominion Freight Lin	Industrials	Ground Transportation	38.52B	37.43	03/05/2025	0.62	1.12	180.35	-8.54	-22.68
SAFRY	Safran F	Industrials	Aerospace & Defense	106.37B	--	05/29/2024	0.93	0.59	63.60	-2.54	-3.88
CDNS	Cadence Design Sys Inc	Information Technology	Software	70.85B	71.18	--	--	--	258.80	-4.40	-21.33
DBX	Dropbox Inc	Information Technology	Software	8.28B	18.54	--	--	--	26.70	-16.15	-19.89
ORCL	Oracle Corp	Information Technology	Software	469.36B	44.37	01/10/2025	0.95	1.60	168.10	-4.65	-15.23
PLTR	Palantir Technologies In	Information Technology	Software	237.70B	589.79	--	--	--	100.16	-4.63	-20.14
▼ SELL: 02/17 - 02/21											
META	Meta Platforms Inc	Communication Services	Interactive Media & Services	1,731.88B	29.50	03/14/2025	0.31	2.10	682.90	-1.62	-7.83
NKE	Nike Inc Cl B	Consumer Discretionary	Textiles, Apparel, & Luxury Goods	113.15B	23.69	03/03/2025	2.10	1.60	76.33	-0.95	-28.41
SBUX	Starbucks Corp	Consumer Discretionary	Hotels Restaurants & Leisure	126.94B	36.29	02/14/2025	2.18	2.44	111.70	-1.40	-2.60
HSY	Hershey Co	Consumer Staples	Food Products	34.99B	15.01	02/14/2025	3.16	5.48	173.20	+4.07	-18.27
KMI	Kinder Morgan Inc Del	Energy	Oil, Gas & Consumable Fuels	58.68B	22.98	02/03/2025	4.35	1.15	26.41	-0.68	-16.11
EVR	Evercore Partners Cl A	Financials	Capital Markets	9.52B	29.62	02/28/2025	1.28	3.20	250.01	-2.67	-22.85
HLI	Houlihan Lokey Inc Cl A	Financials	Capital Markets	12.01B	34.94	03/03/2025	1.33	2.28	171.23	-2.57	-10.86
▼ THINKING ABOUT: 02/17 - 02/21											

## Fixed Income: Bonds

- Bank of Montreal Bond, 4.6774% YTM, 09/14/27 Mat
- Voya Financial Inc. Bond, 4.8417% YTM, 06/15/26 Mat

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