

INVESTMENT FORUM AGENDA
WEDNESDAY, MARCH 5, 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.

Another mostly down week, with the S&P down 1.0%; the NASDAQ down 3.5%; the Russell 2000 down 1.5%; gold down 2.9%, and Bitcoin down 3.3%. (Yes, I have added gold and Bitcoin to my market indicators!) Driving markets were positive fourth quarter earnings, soft inflation numbers. geopolitical drama, and worrisome consumer sentiment numbers.

Topics This Week.

The Week that Was. David Toms will not be leading us this week, so we be on our own! European markets are getting attention now. Opportunities there?

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, and Alan Glen will talk about his

strategy on March 19. I am looking for others. I suggest discussions similar to the “my investor journey,” that we have had over the years, addressing such topics as: how you have evolved as an investor; current objectives; how you look for stocks, what sources you use (advisors, newsletters, news media, on-line services, and, of course, the Investment Forum.) Or whatever you want to say!

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 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.

Al Smuzynski
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Buy, Sell, Thinking About: w/e 02/28/25

BUY		BUY	
	Dime Community Bancshrs 5.5% Pfd (DCOMP) [+]		D-Wave Quantum Inc. (QBTS)
	JPMorgan Nasdaq Eqty Prem ETF (JEPQ) [+]		Rigetti Computing, Inc. (RGTI)
FA	Deutsche Telekom AG (DTEGY)		Medical Properties Trust Inc. (MPW) [+]
FA	Compagnie Financière Richemont SA (CFRUY)		AES Corp. (AES) [+]
FA	Barclays PLC (BCS)		3-yr US Treasury Note, 4.08% YTM
	Capital Southwest Corp. (CSWC) [+]		
FA	HSBC Holdings plc (HSBC)		
FA	Lloyds Banking Group plc (LYG)		
FA	UBS Group AG (UBS)		
FA	UniCredit S.p.A. (UNCRY)		
FA	AstraZeneca PLC (AZN)		
FA	Roche Holding AG (RHHBY)		
FA	AB Volvo (publ) (VLVLY)		

Buy, Sell, Thinking About: w/e 02/28/25

SELL		SELL	
	Parnassus Core Equity Fund - Inv Shrs (PRBLX) [C]		
FA	Alphabet Inc. (GOOGL) [-]		
FA	Netflix, Inc. (NFLX) [-]		
FA	Amazon.com, Inc. (AMZN) [-]		
	Amgen, Inc. (AMGN) [-]		
	Gilead Sciences, Inc. (GILD) [-]		
	Pfizer, Inc. (PFE) [C]		
FA	Advanced Micro Devices, Inc. (AMD) [C]		
FA	Broadcom, Inc. (AVGO) [-]	THINKING ABOUT	
FA	Salesforce Inc. (CRM) [-]		Vanguard FTSE Europe ETF (VGK)
FA	Lam Research Corporation (LRCX) [C]		
FA	Nvidia Corp. (NVDA) [-]		
FA	Taiwan Semiconductor Mfg ADR (TSM) [-]		

Buy, Sell, Thinking About: w/e 02/28/25

Symbol	Description	Sector	Industry	Market Cap	P/E (ttm)	Ex-Date	Dividend Yield	Dividend	Last Trade	% Change	% Chg frm 52 Wk High
BUY: 02/24-02/28											
DCOMP	Dime Community 5.5% Pfd	--	--	--	--	02/06/2025	7.12	1.38	19.32	-0.41	-9.89
JEPQ	J P Morgan Nasdaq Eqt	--	--	23.29B	--	03/03/2025	9.89	5.55	56.10	+1.54	-4.17
DTEGY	Deutsche Telekom Ag F	Communication Services	Diversified Telecommunication Services	176.93B	14.91	04/12/2024	2.24	0.81	36.18	+1.17	-2.11
CFRUY	Compagnie Financiere R F	Consumer Discretionary	Textiles, Apparel, & Luxury Goods	120.13B	33.70	09/20/2024	1.57	0.32	20.35	+1.29	-0.97
BCS	Barclays Plc F	Financials	Banks	56.38B	8.88	02/28/2025	2.71	0.43	15.88	+2.75	-0.87
CSWC	Capital Southwest Corp	Financials	Capital Markets	1.17B	16.19	03/14/2025	11.02	2.55	23.15	+1.00	-14.98
HSBC	Hsbc Hldgs Plc F	Financials	Banks	208.74B	9.33	03/07/2025	5.52	3.30	59.79	+2.96	-0.20
LYG	Lloyds Banking Group P F	Financials	Banks	55.43B	11.57	04/11/2025	4.26	0.16	3.76	+1.63	-0.53
UBS	Ubs Group Ag F	Financials	Capital Markets	108.79B	22.62	--	2.62	0.90	34.29	+1.30	-4.32
UNCRY	Unicredit Spa F	Financials	Banks	82.02B	8.86	11/22/2024	5.56	1.45	26.06	-0.57	-2.36
AZN	Astrazeneca Plc F	Health Care	Pharmaceuticals	233.53B	33.52	02/21/2025	2.05	1.55	75.75	+0.74	-13.60
RHHBY	Roche Hldg Ltd F	Health Care	Pharmaceuticals	265.93B	29.09	03/14/2024	3.23	1.35	41.74	+0.72	-1.63
VLVLY	Volvo Ab F	Industrials	Machinery	63.05B	13.81	04/04/2025	5.44	1.68	30.89	-1.95	-4.37
QBTS	D-Wave Quantum Inc	Information Technology	Software	1.62B	--	--	--	--	5.55	-1.44	-51.36
RGTI	Rigetti Computing Inc	Information Technology	Semiconductors & Semiconductor Equipment	2.37B	--	--	--	--	8.49	+5.35	-60.36
MPW	Medical Ppty Tr Inc	Real Estate	Health Care REITs	3.35B	--	03/10/2025	5.47	0.32	5.8507	+5.73	-10.68
AES	Aes Corp	Utilities	Independent Power & Renewable Electricity P	8.24B	7.60	05/01/2025	5.99	0.70	11.68	+11.66	-47.41
SELL: 02/24-02/28											
PRBLX	Parnassus Core Equity Investo	--	--	--	--	--	--	--	61.06	+1.46	-10.40
GOOGL	Alphabet Inc Class A	Communication Services	Interactive Media & Services	2,063.41B	21.47	03/10/2025	0.47	0.80	170.61	+1.06	-17.60
NFLX	Netflix Inc	Communication Services	Entertainment	411.96B	49.93	--	--	--	980.62	+1.82	-7.88
AMZN	Amazon.Com Inc	Consumer Discretionary	Consumer Discretionary Distribution & Retail	2,212.17B	38.76	--	--	--	212.63	+1.70	-12.33
AMGN	Amgen Inc	Health Care	Biotechnology	164.29B	40.53	02/14/2025	3.11	9.52	306.55	+0.73	-11.62
GILD	Gilead Sciences Inc	Health Care	Biotechnology	142.46B	290.68	03/14/2025	2.77	3.16	114.01	+2.07	-0.66
PFE	Pfizer Inc	Health Care	Pharmaceuticals	147.91B	18.74	01/24/2025	6.53	1.72	26.35	+1.26	-16.46
AMD	Advanced Micro Device In	Information Technology	Semiconductors & Semiconductor Equipment	161.82B	104.74	04/27/1995	--	--	100.13	+0.35	-55.95
AVGO	Broadcom Inc	Information Technology	Semiconductors & Semiconductor Equipment	927.16B	165.07	12/23/2024	1.17	2.36	200.87	+0.82	-20.25
CRM	Salesforce Inc	Information Technology	Software	282.22B	48.32	12/18/2024	0.54	1.60	297.15	+1.00	-19.47
LRCX	Lam Resh Corp	Information Technology	Semiconductors & Semiconductor Equipment	97.78B	24.72	03/05/2025	1.20	0.92	76.86	+0.75	-31.98
NVDA	Nvidia Corp	Information Technology	Semiconductors & Semiconductor Equipment	2,931.66B	44.65	03/12/2025	0.03	0.04	124.99	+3.97	-18.38
TSM	Taiwan Semiconductor M F	Information Technology	Semiconductors & Semiconductor Equipment	819.83B	23.43	03/18/2025	1.37	2.47	180.80	-0.31	-20.14
THINKING ABOUT: 02/24-02/28											
VGK	Vanguard Ftseeuropean Etf	--	--	25.65B	5.16	12/20/2024	3.26	2.29	70.20	+0.54	-2.61

Fixed Income:

- 3-yr US Treasury Note, 4.08% YTM

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