

INVESTMENT FORUM AGENDA
WEDNESDAY, NOVEMBER 19, 2025
TALLWOOD TA-1, 10:30 AM and Zoom
Meeting ID: 8608 2658 362
Passcode: 286 680

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

Forum Notes

Today is the Forum's first Club session during this time between the Fall and Winter terms. All our meetings as a Club start at 10:30 AM.

Today is also the last meeting for this month. Our next meeting will be on December 3rd, at 10:30 AM here in TA-1

Markets

Last week provided yet another example of quickly the markets can change. Early in the week, the key measures set new records, only to strongly pull back in midweek before recovering somewhat at week's end.

The DJIA opened the week at 47,095.06 and closed at 47,147.48. YTD up 10.82%

S&P 500 opened the week at 6,785 and closed at 6,734. YTD up 14.49%

NASDAQ opened the week at 23,354 and closed at 22,900. YTD up 18.59%

Russell 2000 opened the week at 2,451.75 and closed at 2,388.23. YTD up 7.09%

Bitcoin opened the week at \$104,723 and closed at \$95,549. YTD up 17.8%

Gold opened the week at \$4067.57 and closed at \$4080.78. YTD up 55.5%

10-year Treasury Bond yield started the week at 4.116% and ended at 4.14%

This Week's Topics

The Week in Review

David Toms will recap some of the past week's economic, financial, and market news.

Investing for Grandchildren

Al Smuzynski will share his thoughts on investing for Grandchildren

Buys, Sells, and Thinking Abouts

We will review the Buys, Sells, and Thinking Abouts submitted last week by Forum members.

Future Topics

My Investor Journey

While members of the Forum may have similar investing strategies, each of us has followed our own path to arrive at our current strategy. Please consider sharing how you have evolved as an investor, your current goals and investing style with the Forum. Please see Al Smuzynski or me for further information.

Other

Investment Forum Website

The Investment Forum website can 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 in the dropdown list. Please contact Jim Coile, the Webmaster with any presentation contributions, article suggestions, or improvements by email: ctj44@icloud.com. The website has current and past agenda, buy/sell lists and presentations.

Ray Willson

Investment Forum Associate Moderator

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Buy, Sell, & Thinking About		11/19/25
Buy		Sell
Nvidia (NVDA) [+]		Chevron Corp (CVX)
Broadcom (AVGO) [+]		Oracle (ORCL)
Realty Income (O) [+][4]		USA Rare Earth (USAR)
Vanguard S&P 500 ETF (VOO)		COINBASE Global (COIN)
Micron Technology (MU) [+]		Banco Santander Bond, 3.244%, due 10/5/2026
MP Materials (MP)		
Amphenol Corp (APH)		
Western Digital Corp (WDC)		
		Thinking about
		IShares Silver Trust (SLV) ETF
		CVS Health Corp (CVS)
		JPIE, FLXR, BINC, CGMS [FA]