

INVESTMENT FORUM AGENDA
WEDNESDAY, JANUARY 28, 2026
TALLWOOD TA-1, 11:50 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.

A reminder that the Tallwood facility follows the GMU Fairfax campus schedule. When there is adverse weather, please check the daily schedule or other e-mail notice from OLLI for class status.

Forum Notes

Today is the second session of the Forum's Winter Term. The last Winter term session of the Forum will be on February 11.

Markets

Results of the major indices and markets last trading week, January 20-23

Index/Market	Opening Value (Jan 20, 2026)	Closing Value (Jan 23, 2026)	12 month Change (as of Jan 23, 2026)
S&P 500	6,846.56	6,915.61	13.02%
DJIA	49,005.01	49,098.71	10.17%
NASDAQ	23,142.69	23,501.24	17.19%
Russell 2000	2,670.00	2,679.60	6.03%
Bitcoin (BTC)	92,553.60	89,503.88	14.7%
Gold	4,662.20	4,976.20	82.51%
10 Year Treasury Bond	4.30%	4.24%	

Source: Yahoo finance

NB: Trading week shortened due to Federal Holiday, MLK Day, Jan 19.

This Week's Topics

The Week in Review

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

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: ctj444@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 for WE 01/23/2026	OLLI-GMU Investment Forum, 01/28/2026
Buy	Sell
Vanguard S&P 500 ETF (VOO)	
GE Aerospace (GE) [+]	
Vanguard PRIMECAP fund (VPMCX) [+]	
iShares Core MSCI Emerging Markets ETF (IEMG) [+]	Vanguard S&P 500 ETF VOO) [-]
Cummins Inc. (CMI) [+]	Adobe Inc. (ADBE) [C]
Cintas Corporation (CTAS) [+]	
EQT Corporation (EQT) [+]	
iShares MSCI India ETF (INDA) [+]	
Trinity Capital Inc (TRIN) [+]	Exxon Mobil (XOM) [-]
Pfizer Inc (PFE) [+]	Gilead Sciences Inc (GILD) [-]
Chevron Corp (CVX) [+]	
VICI Properties (VICI) [+]	
ONEOK Inc (OKE) [+]	
Tesla (TSLA) [+]	Northrop (NOC)
	Vanguard Total Stock Market. (VTSAX) [-]
<i>Bonds</i>	
Petroleos Mexicanos, 5.95%, make whole, 1/28/2031, YTM 6.432%	
Highwoods Properties Inc., 16 April 2029, 4.6806% YTM	
Atlassian Corporation, 15 May 2029, 4.4123% YTM	
United States Treasury, 15 November 2027, 3.4671% YTM	Thinking About
United States Treasury, 31 December 2026, 3.5057% YTM	American International Group Inc. (AIG)
Legend: [+] Add [-] Trim [C] Close [N] New [FA] Financial Advisor [#] number of members	