

INVESTMENT FORUM AGENDA  
WEDNESDAY, APRIL 8, 2026  
TALLWOOD TA-1, 11:50 AM, and Zoom  
Meeting ID: 812 2246 3957  
Passcode: 850 669

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. Plenty of seating is available and there is an extra dimension to classes in-person, that is not available on Zoom. Parking is available on site or at the swimming pool parking lot next door.

**Markets.**

An up week, with big swings driven by war news, and escalating oil prices. A surprise positive jobs' creation numbers, adding to uncertainty on future interest rate changes.

	<u>1 week change</u>	<u>YTD change.</u>	<u>12 month change</u>
DJIA	+3.0%	-3.2%	+14.7%
S&P 500	+3.4%	-3.8%	+22.0%
Russell 2000	+3.3%	+1.0%	+32.5%
Bitcoin	-2.0%	-24.7%	-30.0%
Gold.	+5..8%	+7.8%.	+49.9%

**Topics This Week.**

The Week in Review. David Toms will do his presentation on important economic data from the past week, and other topics.

Buys, Sells, and Thinking Abouts. Lou Coglianesse and Bob Baker will look at this week's Buys and Sells, and Thinking Abouts.

## **Future Topics.**

Space. New member Elizabeth McGovern, retired from government space agency, and her colleague, Allison Nichols, will discuss current efforts in space exploration, government and private and future opportunities, on April 22.

## **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\$tmment 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.

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**Buy, Sell, & Thinking About for WE 04/03/2026****OLLI-GMU Investment Forum, 04/08/2026**

<b>Buy</b>	<b>Sell</b>
Tesla (TSLA)*	
Hercules Capital (HTGC)*	Alphabet (GOOGL)*
	Chevron (CVX)*
Chevron Corp. (CVX) Puts [N]	
Exxon Mobil Corp. (XOM) Puts [N]	
Schwab US Dividend Equity ETF (SCHD) [+]	Vanguard Small Cap (Blend) (VB) [-]
Vanguard Large Cap Value (VTV) ETF	Exxon Mobil Corp. (XOM) [-]
NiSource Inc. (NI) [N]	
BondBloxx 10 Year Target Duration US Treasury ETF (XTEN) [N]	Rolls-Royce Holdings plc (RYCEY) [C]
4.25% T-note due 1-15-28 [N] [FA]	Roche Holding AG (RHHBY) [-]
	<b>Thinking About</b>
SPDR S&P 500 ETF Trust (SPY) [+]	Alphabet (GOOGL)
GS Nasdaq-100 Core Premium Income ETF (GPIQ) [+]	Microsoft (MSFT)
SPDR Gold Shares (GLD) [+]	Taiwan Semiconductor (TSM)
Vanguard FTSE Emerging Markets ETF (VWO) [+]	
Freedom 100 Emerging Markets ETF (FRDM) [+]	Boeing (BA)
United Parcel Service, Inc. (UPS) [N]	Fannie Mae (FNMA)

Legend: [+] Add [-] Trim [C] Close [N] New [FA] Financial Advisor [#] number of members \*Trades from prior week