

INVESTMENT FORUM AGENDA
WEDNESDAY, April 15, 2026
TALLWOOD TA-1, 11:50 A.M. 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.

Registration for OLLI's Spring Term remains open. If you have not registered yet, please sign-up as soon as you can.

Forum Notes

This is the fourth session of the Investment Forum for the Spring Term. The last Spring Term meeting will be on Wednesday, May 13th at 11:50 AM here in TA-1.

For those new to the Forum, we continue to extend the opportunity to introduce yourself, tell us briefly about your work history, reasons why you joined the Forum and your investment strategy.

Markets

Results of the major indices and markets last trading week, April 6-10.

Index/Market	Opening Value (Apr 6, 2026)	Closing Value (April 10, 2026)	12 month Change (as of Mar 27, 2026)
S&P 500	6,608.43	6,816.89	-0.42%
DJIA	46,569.64	47,916.57	-0.31%
NASDAQ	22,005.32	22,902.89	-1.46%
Russell 2000	2,534.19	2,630.59	+5.99%
Bitcoin (BTC)	68,982.61	72,979.05	-0.88%
Gold	4,656.10	4,761.90	-0.91%
10 Year Treasury Bond	4.320%	4.340%	--

Source: Yahoo finance, Google, Marketwatch

This Week's Topics

Week in Review

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\$tmnt 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 04/10/2026	OLLI-GMU Investment Forum, 04/15/2026
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Buy	Sell
Fannie Mae (FNMA) [N]	Vanguard Financial Sector (VFH) [-]
Fidelity Contrafund (FCNTX) [N]	
Fidelity Select Industrials (FIDRX) [+]	Fidelity Select Financials (FIDSX) [C]
Fidelity Select Consumer Staples (FDFAX) [N]	
United Parcel Service, Inc. (UPS) [+]	Sanofi (SNY) [C]
RTX Corporation (RTX) [N]	AstraZeneca PLC (AZN) [-]
	Alphabet Inc. (GOOGL) [-]
Broadcom (AVGO)	Amazon (AMZN) \$200 Puts Expires 12/2028 [N]
Palantir (PLTR)	Apple (AAPL) \$250, \$260 Puts Expires 1/2028 & 12/2028 [N]
SiTime (SITM)	Alphabet (GOOGL) \$285 Puts Expires 12/2028 [N]
	NVIDIA (NVDA) \$180 Puts Expires 12/2028 [N]
BlackRock Flexible Income ETF (BINC) [N]	Fidelity Strategic Income Fund (FADMX) [C]
Morgan Stanley Emerging Markets Bond ETF (EDD) [+]	
JPMorgan Equity Premium Income ETF (JEPI) [+]	Thinking About
PGIM AAA CLO ETF (PAAA) [+]	OMC
	Fannie Mae (FNMA)
	Alpine Income Property Trust, Inc. (PINE)

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