

INVESTMENT FORUM AGENDA
WEDNESDAY, APRIL 22, 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.

Another big up week, with most averages hitting new all time highs and up YTD. Driven by optimism on ending war in Iran and opening Strait of Hormuz, and falling oil prices. But the Strait is closed again, so how will markets react on Monday? Early first quarter corporate earning (mostly banks) are coming in good, with positive guidance.

	<u>1 week change</u>	<u>YTD change.</u>	<u>12 month change</u>
DJIA	+3.2%	+2.9%	+26.3%
S&P 500	+4.5%	+4.1%	+34.9%
Russell 2000	+5.6%	+10.9%	+50.9%
Bitcoin	+1.7%	-14.5%	-10.8%
Gold.	+2.6%	+12.0%.	+41.3%

Topics This Week.

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

Space. New member Elizabeth McGovern, retired from a government space agency, and her colleagues, Allison Nicholss and Kirsten Baurenschmidt, will discuss the background and current efforts in space exploration, government and private, and current and future opportunities.

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

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.

Al Smuzynski
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Buy, Sell, & Thinking About for WE 04/17/2026**OLLI-GMU Investment Forum, 04/22/2026**

Buy	Sell
Verizon Communications (VZ) [+]	AT&T Inc. (T) [C]
CTO Realty Growth (CTO) [+]	MSC Industrial Direct (MSM) [C]
Ares Capital (ARCC) [+]	Medtronic plc (MDT) [C]
Amcor plc (AMCR) [+]	
Alpine Income Property Trust (PINE) [N]	
iShares Core MSCI Emerging Markets ETF (IEMG) [+]	
RTX Corporation (RTX) [+]	
Quantum Computing Inc. (QBTS) [N]	Quantum Computing Inc. (QBTS) [C]
Fannie Mae (FNMA) [+]	
PGIM AAA CLO ETF (PAAA) [+]	
PNC Bank 4-month CD (3.5%) [N]	Vanguard MMKT [-]
Vanguard Interm-Term Corp Bond ETF (VCIT) [+]	PNC MMKT [-]
Brokered 3-month CD (3.9%) [N]	
Netflix Inc. (NFLX) [+]	Equinor ASA (EQNR) [-]
Rocket Companies Inc. (RKT) [N]	Micron Technology Inc. (MU) [C]
Sysco Corporation (SYY) [+]	
ONEOK Inc. Bond (Maturing 9/1/2029) [N]	Thinking About
	BlackRock Corporate High Yield Fund (HYT)
	Intel Corp. (INTC)
	Vanguard Intermediate-Term Tax-Exempt Fund (VWIUX)

Legend: [+] Add [-] Trim [C] Close [N] New [FA] Financial Advisor [#] number of members