

INVESTMENT FORUM AGENDA
WEDNESDAY, July 8, 2026
TALLWOOD TA-1, 11:50 A.M. and Zoom
Meeting ID: 863 6322 6951
Passcode: 359 086

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.

New Members If you are new and have not introduced yourself, please consider doing so. Your name, what you did, how long you have been an investor, and why you joined us. You can do this in-person or on Zoom.

Forum Notes

Markets

Due to the holiday, last week the markets were closed on Friday. It will again be an interesting market week as the situation with Iran and the Strait of Hormuz remains unsettled. Large caps and tech stocks saw gains while small caps lagged slightly, along with weakness in Gold. Yield on 10 year US Treasury bonds rose slightly despite a small decrease on Friday attributed to the weaker job growth. (ChatGPT)

Results of the major indices and markets last trading week, Jun 29-Jul 2.

Index/Market	1 Week Change	YTD Change	1 Year Change
S&P 500	1.71%	9.32%	19.17%
DJIA	1.89%	10.06%	18.01%
NASDAQ	1.87%	11.15%	25.39%
Russell 2000	-0.39%	20.72%	33.22%
Bitcoin (BTC)	2.24%	-27.9%	-44.8%
Gold	+2.69%	-4.9%	27%
10 Year Treasury Bill	11 bps	28 bps	10 bps

This Week's Topics

Week in Review

David Toms will cover the highlights of the past week.

Buys, Sells, and Thinking Abouts.

Bob Baker will look at this week's Buys and Sells, and Thinking Abouts. We will continue to use AI as part of our analyses.

Other

Portfolio Allocation:

Thanks to those who have shared their portfolio allocation and rationale with us. We are looking for other members willing to share their experiences and investment strategies. Please let me or AI know.

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.

Ray Willson

Investment Forum Associate Moderator

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Buy, Sell, & Thinking About for WE 07/03/2026		OLLI-GMU Investment Forum, 07/08/2026	
Buy		Sell	
Citigroup Inc. (C)		1,000 bu Corn (Corn Futures)	
iShares Expanded Tech-Software Sector ETF (IGV) [+]		Freedom 100 Emerging Markets ETF (FRDM) [-]	
A.P. Møller - Mærsk A/S (AMKBY) [+]		Eli Lilly and Company (LLY) [-]	
Banc of California, Inc. (BANC) [+]			
UBS Group AG (UBS) [+]			
Vistra Corp. (VST) [+]			
Bond: Energy Transfer LP 4.5513% 07/01/2029			
Bond: Las Vegas Sands Corp. 4.9886% 08/08/2029			
Bond: Oracle Corporation 5.1250% 11/09/2029		Janus Henderson Detroit Street Trust AAA CLO ETF (JAAA) [-]	
Bond: 5-Year 4.375% U.S. Treasury Note [FA]		PGIM AAA CLO ETF (PAAA) [-]	
		Thinking About	
		Chipotle Mexican Grill (CMG)	
		Baron Emerging Markets (BEXFX)	
		Fidelity international Growth (FIGFX)	
		NEOS MLP & Energy Infrastructure High Income ETF (MLPI)	
		Roche (RHBBY)[+]	
Legend: [+] Add [-] Trim [C] Close [N] New [FA] Financial Advisor [#] number of members			