

OLLI-GMU Investment Forum
Compendium
of
Buy, Sell, & Thinking About Lists

for weeks ending
10/31/2025 through 11/28/2025

Lou Coglianesi

12/3/2025

Buy, Sell, & Thinking About (Week Ending 11/28/25)		OLLI-GMU Investment Forum 12/3/25	
Buy		Sell	
Goldman Sachs Nasdaq-100 Premium Inc ETF (GPIQ) [+]		Amgen (AMGN) [C]	
Meta Platforms Inc (META) [+]		Devon Energy Corp (DVN) [C]	
Blue Owl BDC (OBDC) [+]			
IShares MSCI Poland ETF (EPOL) [+]			
Resmed (RMD)			
BitWise 10 Crypto (BiTW)			
NIVIDIA (NDVA) - GTC limit order @ 175 on 11/12			
		Thinking about	
		CVS (CVS)	
Legend: [+] Add [-] Trim [C] Close [N] New [FA] Financial Advisor [#] number of members			

Buy, Sell, & Thinking About (Week Ending 11/21/25)		OLLI-GMU Investment Forum	11/26/25
Buy		Sell	
Procter & Gamble Company (PG) [N][FA]		UnitedHealth Group Inc. (UNH) [C][FA]	
Blue Owl Capital Corp Ordinary Shares (OBDC)		Fidelity Bitcoin ETF (FBTC)	
		First Trust US Equity Opportunities ETF (FPX) [-]	
		iShares Semiconductor ETF (SOXX) [-]	
		ProShares Pet Care ETF (PAWZ) [-]	
		Amazon (AMZN) [C]	
Blackstone Private Credit Fund bond 5.05% 9/10/2030, BBB, make whole, @97.2		IShares MSCI Germany ETF (EWG)	
		Thinking about	
		Bristol Myers (BMY)	
Legend: [+] Add [-] Trim [C] Close [N] New [FA] Financial Advisor [#] number of members			

Buy, Sell, & Thinking About (Week Ending 11/14/25)		OLLI-GMU Investment Forum 11/19/25
Buy		Sell
Nvidia (NVDA) [+]		Chevron Corp (CVX)
Broadcom (AVGO) [+]		Oracle (ORCL)
Realty Income (O) [+] [4]		USA Rare Earth (USAR)
Vanguard S&P 500 ETF (VOO)		COINBASE Global (COIN)
Micron Technology (MU) [+]		Banco Santander Bond, 3.244%, due 10/5/2026
MP Materials (MP)		
Amphenol Corp (APH)		
Western Digital Corp (WDC)		
		Thinking about
		iShares Silver Trust (SLV) ETF
		CVS Health Corp (CVS)
		JPIE, FLXR, BINC, CGMS [FA]
Legend: [+] Add [-] Trim [C] Close [N] New [FA] Financial Advisor [#] number of members		

Buy, Sell, & Thinking About (Week Ending 11/7/25) OLLI-GMU Investment Forum **11/12/25**

Buy,

Serve Robotics Inc (SERV)

Amazon (AMZN) [+]

Verizon (VZ) [+]

NVIDIA (NVDA) [+]

JP Morgan Income ETF (JPIE) [+] [2]

Sell

Merck (MRK)

IShares MCSI India ETF (INDA)

Main Street Capital [MAIN]

Hercules Capital [HTGC]

Kimberly Clark (KMB)

Fidelity Tax-Free Bond Fund (FTABX)

Thinking about

None this week

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Buy, Sell, & Thinking About		(Week Ending 10/31/25)	OLLI-GMU Investment Forum	11/5/25
Buy			Buy	
Vaneck Vietnam ETF (VNM)			Kimberly Clark Corporation (KMB) [+]	
iShares MSCI South Korea ETF (EWY) [+]			Phillips 66 (PSX) [+]	
Meta Platforms Inc (META) [+]			Mondelez International Inc. (MDLX) [+]	
Waste Management, Inc. (WM)			Sun Life Financial Inc (SLF) [+]	
Vanguard Value ETF (VTV) [+]			Synovus Financial Corp (SNV) [+]	
VanEck Rare Earth & Strat Mtls ETF (REMX)			Wells Fargo & Company (WFC) [+]	
Lynas Rare Earths Ltd (LYSCF)			ONEOK Inc., 9/30/2028 maturity date, 4.4610% YTM	
NVIDIA (NVDA) [+]			UST 8/31/2028 maturity date, 3.7239% YTM	
Defiance Quantum ETF (QTUM) [+]			MAIN 8/15/2028 maturity date, 5.2897% YTM	
Vanguard Health Care ETF (VHT) [+]			Shopify (SHOP) [+]	
			Intuitive Surgical (ISRG) [+]	
			Alphabet (GOOGL) [+]	
			Palantir (PLTR) [+]	
Sell			Thinking about	
Elevance Health (ELV)			Vanguard Value ETF (VTV)	
Merck (MRK) [2]			Vanguard Small Cap ETF (VB)	
Synovus Financial Corp (SNV)			Perpetua Resources Corporation (PPTA)	
			CMR Surgical (CMR)	
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