

INVESTMENT FORUM PROGRAM FOR WEDNESDAY, FEBRUARY 27, AT 10:30AM

The Forum will meet at 10:30AM through March 16, and at 11:50AM starting March 23 for the Spring Term

Tom Crooker will moderate the Forum on March 6.

Speakers needed to do ten-minute segments on topics of your choice! Please see Tom.

Market Perspective. The market had several big moves during the week, up and down, but finished little changed. The DOW was down 0.13%; the S&P down 0.28%; and the NASDAQ down 0.95%. Bond prices rose (yields declined) slightly. The sequester is on everybody's mind now, and what kind of impact it will have. And there is lots of talk of a correction, which echo Gloria's look at technical indicators last week.

Searching for Yield (continued.) We did not get to this topic last week, so we will try again. Posted on the Forum website is an article from ETFdb.com, "How to Find the Right Dividend ETF," with a comparison of 28 ETFs. with dividend yields of 2.3% to 7.1%. Let's look at those, and dig into some of the more interesting ones.

Allocations and Rebalancing. I will look at a professionally-managed endowment fund, that is allocated into 17 sectors, and follows a rigorous fund selection criteria and rebalancing.

Playing in the Sandbox. Many investors have a "sandbox" - a (very) small allocation of their investment portfolios, that they use to make high-risk investments, or which do not comply with their investment objectives, or investments based on "hunches," or because they like the ticker symbol, or other good or bad reasons.

Stocks for a Ten-Year Old. A member asks for suggestions of stocks to buy a ten-year old grandchild. I am sure some of you have interesting ideas.

Buys and Sells.

Buys

Enbridge Energy Management (EEQ)
Kinder Morgan Management (KMR)
MarkWest Energy Partners (MWE)
Plains All American Pipeline (PAA)
I Shares Dow Hones Select Dividend Index ETF (DVY)
Oakmark International I (OAKIX)
McGraw Hill Companies (MHP)
Teva Pharmaceuticals (TEVA)
Whole Foods (WFM)
Comcast (CMCSA)
Calpine Corp (CPN)

Sells

Exelon (EXC)
Fidelity Contrafund (FCNKX)
Sextant International (SSIFX)
Fidelity Intermediate Municipal Income (FLTIX)
American Woodmark (AMWD)
Transocean, LTD (RIG)

Thinking About . . .

What to do about dividend-paying blue chips that appear to be fully priced?
Indonesia ETF
Stocks you might give a grandchild for 10th birthday.
More MLPs
America On-Line (AOL)

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