

## INVESTMENT FORUM AGENDA FOR WEDNESDAY, MARCH 20, 2013, 11:50AM

The Forum will meet at 11:50AM through May 8

***Welcome to the Spring term of the Investment Forum!*** Maury Cralle, the Liason, will introduce the Moderator, Al Smuzynski.

I want to particularly welcome six new OLLI members who have registered for the Forum: Charles Barnard, Derek Cundill, Lynn Rhoads, Daniel Venese, Margaret Whitfield, and Hank Wolf.

***Market Perspective.*** As everybody knows, the DOW and S&P are near all-time highs, with the DOW recording ten straight up days until Friday's modest loss. For the week, the DOW was up .81%; the S&P up .61%, and the NASDAQ up .14%. Year-to-date, the DOW is up 10.76%; the S&P is up 9.43%, and the NASDAQ is up 7.60%. Most economic indicators are positive, and the sequester seems to be having little impact, so far.

Overdue for a pullback? And do we need a pullback?

***Emerging Markets (continued.)*** Following up on last weeks discussion of emerging markets, let's look under the hood of an ETF that invests in equities of an emerging market country, and try to get our heads around the risks.

***Forum member survey of risk profile and investment allocations.*** Last October, 36 of you took a survey of your risk profiles and investment allocations. The surveys were lost, but have now been found. Since so many of you did not take the survey, Maury will hand them out again and collect them at the end of the class. (Those of you who took it the first time can leave a bit early.) The results will be tabulated and presented on March 27.

***Buys and Sells.*** Your buys and sells were not collected last week. This week, we will resume that, so please note your investment activity for the last two weeks.