

INVESTMENT FORUM AGENDA FOR WEDNESDAY, June 4, 2014, 10:30AM, TA-1

We will begin meeting again at 11:50AM on June 18 for the Summer session.

Market Perspective. The market was up again, although with low volumes. The DOW was up 0.7%; the S&P up 1.2%; and the NASDAQ up 1.4%. All three are up YTD, with the S&P up 4.1% YTD. And interest rates continue to trend down, with the 10-year T yielding 2.46%, down from 3.03% at the beginning of 2014.

Investing Over a Lifetime. My discussion last week of my investment objectives, and what I own, generated positive feedback. If you are willing to do a similar presentation of your investing objectives, how you do it, and what you own, please let me know. Of course, you can disclose as much or as little as you wish.

Tom's IRA. Tom Crooker will look at the evolution of his IRA.

From the Buy/Sell list. Three funds, bought by one of you recently: Vanguard Small Cap ETF (VB;) Vanguard Emerging Markets Stock Index ETF (VWO;) and Vanguard FTSE All-World Ex-US ETF (VEU.) These funds represent market segments that we seldom discuss: US small caps, emerging markets, and international, developed markets. We will take a look at these three funds. If the member who bought these funds is willing to discuss them and the reasons you selected them, I would welcome your comments, either during the Forum or, if you would prefer to remain anonymous, you can e-mail your comments to me and I will share them at the Forum, without attribution.

UnderArmour (UA) has appeared has appeared a number of times on the Buy/Sell list. We have not talked much about retailers, so let's look at UA. As a clothing line, it is hot. How does it look as an investment?

Future Forum Topics

Investing in Residential Real Estate. On June 11, Linda de Marlor, a real estate and tax advisor, will discuss residential real estate as an investment. Buying houses as investments, renting them out, and eventually selling them. We will track the process, numbers, benefits, risks and rewards.

If you own residential properties that you purchased as an investment, please share your experiences.

Buys and Sells

Buys

Plains All American Pipeline LP (PAA)
MarkWest Energy Partners LP (MWE)
Financial Sector SPDR ETF (XLF)
AllianceBern Concentrated Growth Fund (WPA)
Southern Company (SO)

Sells

Lorillard, Inc (LO)
Twitter (TWTR)
McDonalds (MCD)

Thinking About . . .

UnderArmour (UA)

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