

## **INVESTMENT FORUM AGENDA FOR WEDNESDAY, JULY 9, 2014, 11:50AM, TA-3**

The Forum will meet at 11:50AM through July 23

OLLI will be closed the weeks of August 4 and August 11, so the Forum will not meet on 8/6 or 8/13

**Market Perspective. DOW 17,000!!!** The DOW closed at 17,068 on Thursday, the end of the trading week. We all know what that means. Sheet cake celebrating the event. Ed Swoboda will let us know when we will have the cake, sometime in the next few weeks.

The markets continued their rise, with the DOW and S&P gaining 1.3%, and NASDAQ gaining 2.0% for the week. The stock markets are now up 3.0% (DOW) and 7.4% (S&P and NASDAQ) YTD. And it has been 3 years since a 10% correction.

**John Woods.** John will discuss his investment strategy and portfolio.

**Seeking Alpha.** Ed Swoboda will discuss how he uses SA.

**Forum Program, July 23.** Ingrid Hendershot, Principal of Hendershot Investments, will be speaking to the Forum on July 23. Ms. Hendershot and her company are financial managers and advisors, and well known to Forum members, some of whom use her investment services. She publishes a newsletter. [www.hendershotinvestments.com](http://www.hendershotinvestments.com)

### ***Buys and Sells (week ending 7/2/2014)***

#### Buys

Celgene (CELG)  
Ameriprise Financial (AMP)  
Procter and Gamble (PG)  
Netflix (NFLX)  
Twitter (TWTR)  
Noodles and Company (NDLS)  
Global X Social Media ETF (SOCL)  
Shutterfly, Inc (SFLY)  
Seadrill (SDRL)  
Transocean (RIG)

### Sells

AFLAC (AFL)

Vanguard REIT Index ETF

Avalon Bay Communities (AVB)

MFA Financial, Inc (MFA) - mortgage REIT

Vanguard Total Bond Market ETF (BND)

IShares US Aggregate Bond ETF (AGG)

Lord Abbett Affiliated Fund (LAAFX)

Pentair PLC (PNR), Vanguard 500 - sold for liquidity cash

### Thinking About . . .

General Electric (GE)

DOW

Thornburg Investment Income Builder A (TIBAX) - sell because of high fees (1.39%)

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