

**INVESTMENT FORUM AGENDA FOR WEDNESDAY, MAY 20, 2015, 10:30AM,
TALLWOOD, TA-1**

We will meeting at 10:30AM at Tallwood, TA-1, to June 10. The Forum Summer term begins on June 17.

Market Perspective. For the week, the DOW was up 0.5%; the S&P up 0.3%; and the NASDAQ was up 0.9%. The S&P finished the week at a new all-time high. There was little news of note, at least none that I could find, that was useful to investors and the direction of the market.

International Stocks and Funds (cont.) This week I will look at EFTs that invest in emerging markets, since we did not get to this last week. First, we will look at the list of countries that are considered Developed Economies, Emerging Economies, and Frontier Economies. You will likely be surprised at some of the names on the various lists. Then we will peruse ETFs and take a look at a few.

If you know of managed mutual funds that invest in emerging markets, that you think have performed well, please let me know (before or during the class) and we will take a look at them also.

Stock of the Week. Salesforce (CRM.) Blackstone Group (BX.)

Carr Whitener funeral. Carr's funeral will be Saturday, May 23, at 4:00 PM, at Springfield United Methodist Church, 7047 Old Keene Mill Road, Springfield.

Buys and Sells (week of May 6)

Buys

Danaher (DHR)

DuPont (DD)

Chesapeake Energy (CHK)

Under Armour (UA)

Westwood Holdings Group, Inc. (WHG) - investment advisory service. MC: \$500M

Blackstone Group, LP (BX) - Asset manager. MC: \$51B. Yield: 6.1%

Sells

Coca Cola (K)

Aircastle (AYR) - commercial aircraft leasing. MC: \$2B

Gilead (GILD)

Thinking About . . .

Centene (CNC) - healthcare plans. MC: \$8B
Precision Castparts (PCP)

Forum Resources

Investment Forum Website. The Investment Forum has its own website, www.olligmu.org/~finforum. Or the OLLI website, www.olligmu.org, and from the Main Menu, click on “Clubs, Group Blogs, and Ongoing Activities,” and then “Investment Forum.” The current agenda and previous agendas are posted, as well as articles in the financial press that members recommend.

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