

**INVESTMENT FORUM AGENDA FOR WEDNESDAY, March 23, 2016, 11:50AM,  
Lord of Life Lutheran Church**

***Welcome to the Tom Crooker Investment Forum.*** The Spring Term will meet 11:50AM to 1:15PM, on Wednesdays from March 23 to May 11, 2016, at Lord of Life Lutheran Church, 5114 Twinbrook Road, Fairfax. Park in back of the church and enter in the back entrance.

I prepare the agenda each weekend and distribute it by e-mail, usually by Monday mornings. Information or commentary in the agenda is based on market data as of Friday.

We have 102 registered for the Spring term. The Lord of Life Fellowship Hall and Sanctuary (we meet in both) accommodates this number. While most members of the Investment Forum have been coming for years, we have 21 new members this term. We will spend some time at our first meeting of each new term on what the Forum is about, with some observations from long-time members. I will ask each of the new members to briefly introduce yourselves, and what you hope to learn at the Forum. (All comments and participation is voluntary.)

***Market Perspective.*** Another up week - the fifth in a row. What a turnaround from the first six weeks of the year. For the week, the DOW was up 2.3%; the S&P was up 1.4%; and the NASDAQ was up 1%. The DOW and S&P are both now up YTD. Rising oil prices and the Fed, not raising the Fed Funds' rate and signaling slower future rate increases, were economic drivers.

***Health Care and Biotech.*** We will look again at the health care sector, and in particular at Biotechs, which were big movers up until they weren't. Is there opportunity now in biotechs?

***Panel Discussion on Stock Picking.*** The Forum is about evenly split on members who buy individual stocks, and members who invest only via funds. We will have a four-person panel discussion on April 20, on exactly how the panel members select their stocks: how they get ideas, how they research their decision and what metrics they use, what services or advice they seek, and at what point they make the actual decision to buy. If you buy individual stocks, and would like to participate on the panel, please let me know.

***Future Topics.*** Mid-cap and small-cap stock funds. Suggestions of small and mid cap stocks to look at, are invited.

## ***Buys and Sells (week of March 20)***

### Buys

Wells Fargo (WFC)  
Bank of America (BAC)  
Ford (F)  
AT&T (T)  
Prudential Financial (PRU)  
Google (GOOG)  
Enterprise Products Partners LP (EPD)  
Fidelity Focused Stock Fund (FTQGX)  
Fidelity Contrafund (FCNTX)  
Fidelity Independence Fund (FDFFX)  
Fidelity Blue Chip Growth Fund (FBGRX)  
Fidelity Blue Chip Value Fund (FBCVX)  
Fidelity Low Priced Stock Fund (FLPSX)

### Sells

Fidelity Limited-Term Bond Fund (FJRLX)  
Fidelity Total Bond Fund (FTBFX) (the two bond funds were sold, and stock funds above purchased)  
Cigna (CI)  
Mondelez (MDLZ)  
iShares Regional Bank ETF (IAD)

### Thinking About . . .

Mediaset (MDS) - ? — television in Italy and Spain  
Valeant (VRX)

***Forum Moderator(s) needed April 27.*** You pick the topics, or I can help. Or a two-person tag-team. I can distribute the agenda.

## **Forum Resources**

***Investment Forum Website.*** The Investment Forum has its own website, [www.olligmu.org/~finforum](http://www.olligmu.org/~finforum). Or the OLLI website, [www.olligmu.org](http://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.

***Morningstar Dividend Investor.*** This newsletter comes out monthly, has a model portfolio of dividend-paying stocks and extensive current analyses of dividend stocks and perspectives on the market. A number of Forum members are avid readers of the newsletter. I will advise how you can receive copies of the newsletter.

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