

## INVESTMENT FORUM AGENDA FOR WEDNESDAY, OCTOBER 4, 2017 11:50AM,

### LORD OF LIFE, SANCTUARY

**Market Perspective.** Another up week, with the DOW, S&P, and NASDAQ up 0.3%; 0.7% and 1.1%, and capping a positive September (historically a down month) and up quarter. Attention was on tax reform, and the proposed 20% corporate tax rate which, if it happens, will improve corporate bottom lines.

**DOW 22,000 sheet cake.** We will celebrate DOW 22,000 on October 11, at the end of class, with our customary sheet cake provided by Ed Swoboda. We had to move it to October 11, when we will be in the Fellowship Hall. No food is permitted in the Sanctuary.

**Utility Stocks.** Brenda Bloch-Young and I will look at the utility sector including:

- How has the sector performed compared to the S&P?
- How has the sector performed compared to bonds?
- What are the bigger names in the sector, and how do they produce electricity and gas?
- Which of the bigger names are the best performers?
- What headwinds do utilities face?

### Upcoming

On October 28, we will have up to four members discuss their “Lessons Learned.” Each member, a long-time investor, will talk about one to three important strategies, investment selection techniques, or advice from other “experts,” that have worked or not worked. The idea is to share your valuable experiences with newer or less experienced investors. Please let me know if you are willing to do this. I am looking for some “fresh faces” in addition to our regulars.

At a date to be determined, we will have discussions from several members on useful sources of information. What services, websites, newsletters do you use and how do you use them? We will try pull them up on the screen, to see what they look like and what they have. Please let me know if you are willing to share your favorites.

## ***Buys and Sells (week ending 9/27/2017)***

### Buys

Apple (AAPL)

General Electric (GE)

Sherwin Williams (SHW)

Vanguard FTSE All-World ex US ETF (VEU) - add to

Enterprise Products Partners LP (EPD) - "Add to. Inflation-adjusted bond equivalent?"

Ship Finance International (SFL) - add to

Uniti Group (UNIT) - add to

National Retail Properties (NNN)- add to

### Sells

### Thinking About . . .

Covanta Holding Corp. (CVA) - "CVA runs the Fairfax incinerator. Currently down for repairs. Is their money to be made in trash?"

Stor Capital (STOR)

NYSE FANG index - index of high growth tech stocks.

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