

**INVESTMENT FORUM AGENDA FOR WEDNESDAY, MAY 22, 2019 11:50AM  
LORD OF LIFE, FELLOWSHIP HALL**

We will meet as a “club” starting May 29 through June 19, at Tallwood. The Summer Term begins June 26.

**Market Perspective.** Markets spent most of the week trying to regain Monday’s big sell-off. For the week the DOW was down 0.7%; the S&P was down 0.8%; and the NASDAQ was down 1.2%. Trade talks with China, or lack of them, drove markets. Other economic news was fairly good. We all need to become expert with companies exposure to China, including ways that are not apparent. Let’s look at some of the risk factors the market faces with China trade.

**Buy/Sell list.** Bob Baker will look at several stocks from last week’s (below) Buy/Sell/Thinking About list.

Garret Ruhl will discuss a method of allocating assets to value, balanced and growth strategies.

**Forum website.** Most Forum Powerpoint presentations are posted on the Forum website, along with agendas and news articles suggested by members.. The Forum website is [www.olligmu.org/~finforum](http://www.olligmu.org/~finforum).

***Buys and Sells***

Buys (Week ending 5/15/2019)

Southwest Airlines (LUV)  
30 day Treasury Bill  
Amazon (AMZN)  
AbbVie (ABBV) - 2 buys  
Intel (INTC)  
Thrift Savings Plan 2040 Target Date  
ExxonMobil (XOM)  
IShares Core S&P Small-Cap ETF (IJR)

Sells (Week ending 5/15/2019)

General Electric (GE)

Kraft Heinz (KHC)

Loews Corp (L)

Merck (MRK) - trim

Thinking About . . .

Livent Corp (LTHM) - lithium. MC: \$1.1B

Microsoft (MSFT)

IBM (IBM)

AT&T (T)

Zebra Technologies (ZBRA) - barcode scanners/readers. MC: \$10B

Waste Management (WM)

Principal Financial Group (PFG) - MC: \$15B. Dividend: 3.95%

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