

INVESTMENT FORUM AGENDA FOR WEDNESDAY, JUNE 3, 2020, 10:30AM

We will meet this week on-line, using Zoom webinar, at 10:30AM. The OLLI Summer Term (June 22-July 31) will meet using Zoom.

The Zoom link is 861-1181-9898. The OLLI calendar on its webpage, olli.gmu.edu has classes and current Zoom links.

Markets

Another up week, driven by optimism as most of the nation has started to reopen. For the week, the DOW was up 3.8%; the S&P was up 3.0%; and the NASDAQ was up 1.8%. Both April and May were strong months, after the March drop and bottoming on March 23. Light at the end of the tunnel? Or the headlight from an oncoming train?

Topics this Week

Investment Advisors. Marvin Singer will share his experiences with three investment advisory services over the years, and what went right and wrong. This is a continuation of discussions we have had and will continue to have on different advisory services. If you are willing to share your experiences, please let me know.

Bob Baker will review the buys and sells, using “finviz,” a free tool for stock screening and analysis.

Garrett Ruhl will comment on where things stand and look at sectors and companies that stand to benefit.

Bond Duration. Time permitting, I will talk about bond and bond fund duration, as a measure of bond price movement.

Upcoming Topics

We will be rescheduling the upcoming topics.

Industrial Automation. Ray Willson will talk about industrial robots and the leading companies in this industry.

Investing Mistakes. Our “lessons learned” panel will talk about humility meted out by Mr. Market.

Gold. Last call for a gold investor (I know you are out there) or expert to step forward and tell us where gold is today and where it is going.

Buys and Sells

Buys (week ending 5/31/2020)

Raytheon Technologies (RTX)

ViacomCBS (VIAC) - merger of Viacom and CBS

Veeva Systems (VEEV) - software for life sciences. MC: \$33B)

CRISPR Therapeutics (CRSP)

ARK Genomic Revolution ETF (ARKG)

Pfizer (PFE)

Merck (MRK)

Marathon Petroleum (MPC)

Sells (week ending 5/31/2020)

None reported

Al Smuzynski
Investment Forum Moderator
asmuzynski@verizon.net