

**INVESTMENT FORUM AGENDA FOR WEDNESDAY,
MARCH 3, 2021 10:30AM**

We will meet as a “club” through March 24, at 10:30AM. The Spring Term begins March 31 and ends May 19.

Registration for the Spring Term is underway and ends Wednesday, March 3 at noon.

The Zoom link for this week is 861 1181 9898, Passcode 468 378. Watch for the daily notices from OLLI of the Zoom links and use those if different from this one.

Markets. Bad week, with the DOW down 1.8%; the S&P down 2.5%, the NASDAQ down 4.9%; and the Russell 2000 down 2.9%. What was hot, is not (tech, growth.) Despite mostly positive economic news, stimulus, light at the end of the tunnel on the pandemic, the Fed and easy money, followed by an expected economic rebound. Rising long term interest rates seem to be spooking the markets.

Topics This Week

Health-Care Sector. Following up on our discussion of the healthcare sector last week, Jim Dann will look at a managed mutual fund of health care stocks, that has outperformed the market.

Options. Charles Murphy will walk through a “Synthetic Long” using sold put options, and purchased call options, as a substitute for buying Apple (AAPL) stock. (This trade, and several others like it, were on the Buy/Sell list several weeks ago.) Charles, Bob Baker, and I will walk through this slowly; you won’t need to be an options guru to understand it.

Bob Baker will look at the Buy/Sell list.

Buys and Sells

Buys (week ending 2/26/2021)

Merck (MRK)
Starboard Value Acquisition Corp (SVAC) - SPAC
Full House Resorts (FLL)
Johnson & Johnson (JNJ)
GameStop (GME)
Main Street Capital (MAIN) - add
ARK Fintech Innovation ETF (ARKF)
Air Produces and Chemicals (APD)
Advanced Micro Devices (AMD) - add
Chevron (CVX) - add
Digital Realty Trust (DLR) - add

Sells (week ending 2/26//2021)

Southern Company (SO)
Peloton (PTON)
Teladoc (TDOC)
Emerson Electric (EMR) - trim
Schwab US Broad Market ETF (SCHB) - trim
Zions Bancorporation (ZION)

Thinking About . . .

AbbVie (ABBV)
NextEra Energy (NEE)
Dominion Energy (D)

Upcoming Topics.

Mutual Funds. Over the next few months, Jim Dann will look at managed mutual funds investing in Asian stocks; and low-cost mutual fund families that are not well known.

Investment Forum Website. The Investment Forum website may be accessed at oli.gmu.edu, then pressing the “Clubs/Groups” link at the upper right of the home page, followed by the “Inve\$tment Forum” link on the dropdown list. Please contact Jim Coile, the Webmaster with any presentation contributions, article suggestion, or improvements by email, ctj444@icloud.com The website has current and past agendas and buy/sell list presentations.

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