

**INVESTMENT FORUM AGENDA FOR WEDNESDAY,  
April 7, 2021, 11:50AM**

The Zoom link for this week can be found in the Daily Schedule, sent to all enrolled in the class on Wednesday morning, or through the Member Portal. The Zoom link is 892 4751 0873 Passcode 016 203. Dial in 301-715-8592.

**Welcome to the Investment Forum.** For our new members I once again invite you to introduce yourselves: your name, what you did, how long you have been an investor, and why you joined us.

**Markets**

A good week to end a strong quarter, with the S&P ending the week above 4,000 and an all-time high. For the week, DOW was up 0.2%; the S&P was up 1.1%; the NASDAQ was up 2.6%; and the Russell 2000 was up 1.5%. Big first quarters for the DOW, S&P, and small caps. Better than expected jobs' numbers on Friday, with stock markets closed, point to an up day tomorrow? Lots of tailwinds, with inflation worries one of the few headwinds.

**Topics This Week**

Investing in Asia. Jim Dann will look at Asia, a general overview that can be accessed by stocks, ETFs and index funds, along with managed mutual funds.

Bob Baker will look at the Buy/Sell list.

**Buys and Sells**

Buys (week ending 4/1/2021)

Procter & Gamble (PG)

Sherwin Williams (SHW)

Athene Holding (ATH) - add

Commercial Metals (CMC) - add

Raytheon (RTX)

Amazon (AMZN)

Hercules Capital (HTGC) - add

AT&T (T) - add  
ARK Space Exploration & Innovation ETF (ARKX)  
ARK Fintech ETF (ARKF)  
CareTrust REIT (CTRE) - add  
Global X Cloud Computing ETF (CLOU)  
Global X Infrastructure Development ETF (PAVE)

Sells (week ending 4/1/2021)

Alleghany Corp (Y)  
Texas Instruments (TXN) - partial  
Ford (F) - trim

Financial advisor trades

### ***Upcoming Topics.***

REITS. Bob Baker will look at REITS; date to be announced

***Investment Forum Website.*** The Investment Forum website may be accessed at [oli.gmu.edu](http://oli.gmu.edu), then pressing the “Clubs & Activities” link in the center of the home page 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](mailto:ctj444@icloud.com). The website has current and past agendas and buy/sell list presentations.

***Garrett Ruhl daily commentary.*** Garrett sends out an early morning commentary and market news by email. To receive it, send a request to him, [gairoak@aol.com](mailto:gairoak@aol.com), to be put on his distribution list.

***Morningstar Dividend Investor.*** I have been forwarding this newsletter each month for ten years to a distribution list. The newsletter includes commentary on dividend investing, with model portfolios and a list of 100 dividend paying stocks with strong fundamentals. Let me know if you would like to be put on my distribution list. (All Morningstar premium newsletters are available through library websites, using a library card number.)

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