

INVESTMENT FORUM AGENDA FOR WEDNESDAY, April 14, 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.

Markets

Another mostly up week, with the DOW up 2.0%; the S&P up 2.7%; the NASDAQ up 3.1%; but the Russell 2000 down 0.5%. For the past few weeks, we have seen growth stocks getting their mojo back, outperforming value stocks and smaller companies. Will value, growth, or small caps be the winners in the expected economic recovery in 2021?

First quarter earnings will be rolling out this week, with big banks reporting first.

Topics This Week

Morningstar Dividend Investor. I have been reading this newsletter for twelve years, and distributing it to many of you for ten years. I will take a look at it: monthly commentary, stock picking criteria, model portfolio, performance over time, and usefulness.

Bob Baker will look at the Buy/Sell list.

Buys and Sells

Buys (week ending 4/9/2021)

Hercules Capital (HTGC) - add

Vici Properties (VICI)

OGE Energy (OGE) - add

Merck (MRK) - add

Medical Properties Trust (MPW) - add

Industrial Select Sector SPDR ETF (XLI)

Lam Research (LRCX)

iShares JP Morgan USD Emerging Markets Bond ETF (EMB) - add
Global Medical REIT (GMRE)
Kellogg (K)
Morgan Stanley (MS) - add
Calamos Convertible & High Income Fund (CHY) - add
General Electric (GE) - add

Sells (week ending 4/9/2021)

Takeda Pharmaceutical (TAK)
Property Solutions Acquisition Corp (PSAC)
Ford (F) - trim
Meredith Corp (MDP)
1000 bushels Corn
200 bushels soybeans
Vanguard Short Term Bond Index Fund (VBIRX)
SPDR Bloomberg Barclays Convertible Securities ETF (CWB) - buy CHY

Financial advisor trades

Constellation Brands (CTZ) - buy

Upcoming Topics.

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

Investment Forum Website. The Investment Forum website may be accessed at olli.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. 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, to be put on his distribution list.

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