

**INVESTMENT FORUM AGENDA FOR WEDNESDAY,  
April 28, 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**

“Pause” was the operative word last week for the markets. For the week, the DOW was down 0.5%; the S&P was down 0.1%; the NASDAQ was down 0.3%; and the Russell 2000 was up 0.4%. Economic news was pretty much the same as previous weeks. Forecasts of economic growth, good employment numbers; strong earnings reports; friendly Fed. News of proposed higher capital gains’ tax rates (as ordinary income, from 23.8% to 43.4%, including Medicare surcharge, kicking in for incomes over \$1 million)) spooked markets on Thursday, but recovered on Friday.

**Topics This Week**

REITs. REITs had a tough 2020, especially retail. But they are coming back, and this week’s Barron’s had bullish comments. Timely for Bob Baker to talk REITs.

Bob Baker will look at the Buy/Sell list.

**Buys and Sells**

Buys (week ending 4/23/2021)

Bitcoin - add

Etherium - add

Honeywell International(HON)

SPDR S&P Biotech ETF (XBI)

First EagleOverseas Fund (SGOVX)

Crown Castle International (CCI)

Kimberly Clark (KMB) - add

Nvidia (NVDA) - add

Simmons First National (SFNC) - add

Sells (week ending 4/23/2021)

Hennessy Small Cap Financial Fund (HSFNX)

Morgan Creek Exos SPAC Originated ETF (SPXZ)

Thinking About . . .

Real Estate Select Sector SPDR (XLRE)

REITs

Kinder Morgan (KMI)

T Rowe Price (TROW)

Alimentation Couche-Tard (ANCUF)

I Shares Convertible Bond ETF (ICVT)

**Investment Forum Website.** The Investment Forum website may be accessed at <https://oli.gmu.edu>, then pressing the “Clubs & Activities” link in the center of the OLLI 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 and other presentations.

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