

**INVESTMENT FORUM AGENDA FOR WEDNESDAY,  
May 12, 2021, 11:50AM**

OLLI Board of Directors election May 7 to May 21.

Registration for the Summer Term May 24 to June 1.

The Forum Spring term sessions end on May 19. We will begin meeting as a “club” on May 26 at 10:30AM. The Summer term begins on June 23.

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**

A mixed week, with value up and growth down. For the week, the DOW was up 2.7%; the S&P was up 1.2%; the NASDAQ down 1.5%; and the Russell 2000 up 0.2%. The big news was the disappointing jobs numbers on Friday, which had a positive effect of confidence in continued easy monetary policy.

**Topics This Week**

“The Great Cash Splash.” Tom Crooker will comment on this article in the Saturday Wall Street Journal.

Index Weightings. Most index funds are weighted by market capitalization. However, there are “equal weight” funds, the most noted the Invesco S&P 500 Equal Weight ETF (RSP.) How does this fund perform compared to its market cap weighted brothers, and what do performance differences signify?

Bob Baker will look at the Buy/Sell list.

**Buys and Sells**

Buys (week ending 5/7/2021)  
Capital Southwest Corp (CSWC)  
Hercules Capital (HTGC) - add  
Bitcoin  
Grayscale Ethereum Trust (ETH)  
\$LINK

Caterpillar (CAT)  
TIA-CREF Real Estate Securities Retail Fund (TCREX)  
OLLI Donation  
Okta, Inc (OKTA)  
Intuitive Surgical (ISRG)  
Semler Scientific (SMLR)  
Five9 Inc (FIVN)  
Facebook (FB)  
Square (SQ)  
wix.com (WIX)

Sells (week ending 5/7/2021)

TCG BDC Corp (CGBD)  
United Parcel Service (UPS) - trim  
Qualcomm (QCOM) - trim  
Unity Software (U)  
Sell \$130 Apple (AAPL) put, expire 6/16/2023  
Sell \$250 Microsoft (MSFT) put, expire 6/16/2023  
Sell \$3,510 Amazon (AMZN) put, expire 6/16/2023

Advisor Managed portfolios

Nextera Energy (NEE)

**Investment Forum Website.** The Investment Forum website may be accessed at <https://olli.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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