

## **INVESTMENT FORUM AGENDA FOR WEDNESDAY, JUNE 30, 2021, 11:50AM**

The Zoom link for the Summer term is 851 5504 4975, Passcode 172003. The Zoom link can also be found in the Daily Schedule, or through the Member Portal.

The Summer Term runs through July 28. We will meet as a “club” starting August 4, 10:30AM, until the beginning of the Fall Term.

New and newer members are invited to introduce yourselves: what you did, how long you have been an investor, and why you joined us. All participation is voluntary.

### **Markets**

What Mr. Market took away from us the week ending June 18, he gave back to us last week. For the week ending June 25, the DOW was up 3.4%; the S&P was up 2.7%; the NASDAQ was up 2.4%; and the Russell 2000 was up 4.3%. Is growth coming back? Nobody knows whether inflation is a concern, or just part of the noise from the pandemic recovery.

### **Topics This Week**

Dividend ETFs. Jim Dann, who usually talks about managed mutual funds, will look at several popular dividend stock ETFs, comparing performance and risk metrics. He will declare a winner!

Bob Baker will look at the Buy/Sell list.

### **Buys and Sells**

Buys (week ending 6/25/2021)

Getty Realty Corp REIT (GTY)

MGM Growth Properties (MGP)

SOFI Technologies (SOFI) - add

Organon (OGN)

Suncor Energy (SU)  
EOG Resources (EOG)  
Deere (DE) - add  
Carnival Corporation (CCL) - add  
Steel Dynamics (STLD) - add  
Westland Chemical Partners (WLKP) - add  
Eli Lilly (LLY) - add

Sells (week ending 6/25/2021)

Mid-American Apartment Communities (MAA) -trim  
Schwab US Broad Market ETF (SCHB) - trim  
Kimco Realty Corp (KIM) -trim  
Public Storage REIG (PSA) - trim  
Clorox (CLX)  
Coinbase (COIN) - trim

Advisor Managed Portfolios

Bank of Hawaii (BOH) - buy  
Cognizant Technology Solutions (CTSH) - buy  
Gentex (GNTX) - buy  
Ross Stores (ROST) - buy  
Organon (OGN) - sell

**Upcoming Topics**

Capital Gains Exclusion on Sale of Primary Residence. I have posted a copy of a Wall Street Journal article, "The Tax Break to Know in a Sellers' Market," on the Forum website. The article is about the \$250,000 single, \$500,000 married couple, lifetime capital gains tax exclusion on sale of a principal residence. With the rise in housing prices, long time homeowners in high housing cost areas (looking at us) may have capital gains taxes on our homes. The exclusion is complicated, and above my pay grade. Brenda Bloch-Young will go over the exclusion, at a date to be determined.

**Other**

Presentations. I am always looking for Forum members to make presentations on stocks, funds, sectors, strategies, the variety of topics we regularly discuss. Please consider talking about something you own, are thinking about, or have a particular interest. While prepared Powerpoint presentations are welcome, you

don't have to do that. We can have worthwhile discussions pulling up websites on the fly, (you can do that, or I can pull it up for you with Share Screen) and we can even create comparisons during the talk. Let's chat about this!

*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.

*Morningstar Dividend Investor.* I forward copies of this monthly newsletter, about dividend stocks and model portfolios, to a distribution list that I maintain. Let me know if you wish to be added to the list.

*Garrett Ruhl daily comments.* Garrett Ruhl, longtime Forum member, distributes a daily email on views from the financial press that day. Let Garrett know if you want to be added to his distribution list. [gairoak@aol.com](mailto:gairoak@aol.com).

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