

INVESTMENT FORUM AGENDA FOR WEDNESDAY, AUGUST 11, 2021, 10:30AM

The Zoom link for the club sessions is 861 3821 8978, Passcode 984305. The Zoom link can also be found in the Daily Schedule or through the Member Portal.

We will meet as a “club” at 10:30AM, until the beginning of the Fall Term, on September 22.

Markets

Known to most Forum long-haulers, markets decline most weeks we do not meet. Didn't happen this week. Markets had small declines the week of July 30, but for this past week, the DOW was up 0.8%; the S&P was up 0.9%; the NASDAQ was up 1.1%; and the Russell 2000 was up 1.0%. The DOW and S&P ended the week at all-time highs. Stellar second quarter earnings and strong jobs' numbers overshadowed worrisome pandemic and inflation numbers.

Topics This Week

Buys and Sells. Bob Baker will look at the buys and sells for the past two weeks.

Buys and Sells

Buys (2 weeks ending 8/6/2021

CVR Energy (CVI) - add
Amazon (AMZN) - add
Applied Materials (AMAT)
Upstart Holdings (UPST) - add
Lightning Emotors (ZEV) - add
Medical Properties Trust (MPW) - add
Altria (MO) - add
AT&T (T) - add
Getty Realty (TGY) - add
Williams Companies (WMB) - add
Ark Space Exploration ETF (ARKX) - add
Ark Innovation ETF (ARKK) - add
Lockheed Martin (LMT)
Gaming & Leisure Products (GLPI)

Pinnacle West Capital Corp (PNW) - add
Cardinal Health (CAH) - add
Facebook (FB) - add
General Electric (GE) - add
Bristol Myers (BMY) - add
Novo Nordisk (NVO) - add
Buy to close IJR \$115 8/20/2021 call option
Etsy (ETSY) - add
Robinhood (HOOD)

Sells (2 weeks ending 8/6/2021)

Vanguard FTSE Emerging Markets ETF (VWO)
Intel (INTC)
Emerson Electric (EMR) - trim
Mid-America Apartment Communities (MAA) - trim
Schwab US Broad Market ETF (SCHB) - trim
Texas Instruments (TXN)
Invesco WilderHill Clean Energy ETF (PBW)
Qualcomm (QCOM) - trim
Vanguard Total International Stock Index (VXUS) - trim
Sell to open IJR \$115 9/17/2021 call option
Moderna (MRNA) - trim
Novovax (NVAX) - trim

Advisor trades

Magna International (MGA) - buy
Broadcom (AVGO) - sell
Vanguard FTSE Pacific ETF (VPL) - sell

Future topics.

Robo Advisors. This week's Barron's has a report on the evolving robo advisor industry, which we have been following. It appears competitive, and a low-cost alternative to (live) financial advisors. We will look at it at a future session.

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 The website has current and past agendas and buy/sell lists and other presentations.

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