

INVESTMENT FORUM AGENDA FOR WEDNESDAY, OCTOBER 20, 2021 11:50AM

The Zoom link for the Fall Term is 845 4198 5377, Passcode 095197. Dial in 301-715-8592. The Zoom link can also be found in the Daily Schedule or through the Member Portal.

It is possible that the Forum will meet in a hybrid session on Wednesday, October 27, at 11:50AM, in TA-1, pending finalization of several matters, including use of the health portal for those to attend in person. This will be the first OLLI hybrid class. If we do this, I would like up to 30 people in TA-1, and the rest on Zoom. Further communication will follow.

Markets

A nice up week, with the DOW up 1.6%; the S&P up 1.8%; the NASDAQ up 2.2%; and the Russell 2000 up 1.5%. Previous concerns since early September - inflation, Covid, supply chains, China/Evergrande; poor jobs numbers, rising interest rates, the debt ceiling, just don't seem like big problems now?

Earnings' season kicked off, with the big banks posting good numbers. We will see how the other sectors do over the next few weeks.

Black Monday. This Tuesday, October 19, is the 34th anniversary of Black Monday. Where were you and what were you doing on Black Monday, as the stock market cratered 22.6% in one day. That would be equivalent to the DOW falling 8,000 points today.

Topics This Week

Sell in May and Go Away. Sylvia Auton will look at some of the market sayings and terms that have popped up over the years, and what they mean.

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

Buys and Sells

Buys (2 weeks ending October 15)

Bristol Myers Squibb (BMY) - add
Medical Properties Trust (MPW) - add
Owl Rock Capital (ORCC) -add
AT&T (T) - add
Verizon (VZ)
CareTrust REIT (CTRE) - add
Wells Fargo (WFC) - add
Citizens Financial Group (CFG) - add
BNP Paribas (BNPQY) - add
Chevron (CVX) - add
Deere (DE) - add
Mayville Engineering (MEC) - add

Sells (2 weeks ending October 15)

Welltower (WELL)
Public Storage (PSA) - trim
Mid-America Apartment Communities (MAA) - trim
Essex Property Trust (ESS)
Schwab US Broad Market ETF (SCHB) - trim
Sell to open 1 IJR \$115 call option, expire 11/19/2020
Laureat Education (LAUR)

Future Topics

ESG investing. Tom Kaufman, David Breese, Brenda Bloch-Young, and Jim Dann will discuss ESG on November 3, likely to continue on November 10. Companies that have strong records on environmental, social, and governance. And ESG funds.

Follow ups. Do you have a follow-up question from a previous Forum topic? Please ask it! If you have a question, others likely are thinking about it also. You can send me an email, and I will bring it up. Or use the chat window on Zoom.

Other

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.

Morningstar Dividend Investor. This is a monthly newsletter, with model portfolios, of interest to dividend investors. that I have distributed the newsletter to interested Forum members for years. (It is also available, along with other Morningstar premium newsletters, via the county library websites.) Please let me know if you would like to be added to my distribution list.

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