

**INVESTMENT FORUM AGENDA FOR WEDNESDAY, OCTOBER 27, 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.

The Forum will meet this week as a test of hybrid classes, with up to 45 people in TA-1, and via Zoom. If you wish to attend in person, please review Paul Howard's instructions, forwarded to you yesterday, attend a Zoom session (last one on Monday, 10/25 at 5PM) where you will provide proof of vaccination, and be familiar with other rules for presence on the Mason campus. We will have our usual discussions of markets, the buys and sells, but we will also test the sound and audio quality from the technology, for both in person and Zoom participants. This class will provide important input to OLLI on hybrid classes, that will go hybrid, likely in the Spring, 2022 term. After our hybrid session this week, we will return to Zoom sessions.

Brenda Bloch-Young will be the Forum Moderator this week.

Markets

Another nice up week, with markets at or near new all time highs, and recovering the modest pullback since Labor Day. For the week, the DOW was up 1.1%; the S&P was up 1.6%; the NASDAQ was up 1.3%; and the Russell 2000 was up 1.1%. Seems the worries of the past few weeks are not longer worries. Third quarter earnings' so far have been strong, with the big tech names reporting this week. Is Mr. Bull back?

Topics This Week

Garrett Ruhl will comment on market trends. Other observations are welcome.

Buys and Sells. Bob Baker will look at your buys and sells from the week.

Buys and Sells

Buys (week ending October 22)

Crown Castle (CCI) - add
Walgreens Boots Alliance (WBA) - add
Getty Realty Corp. (GTY) - add
Hercules Capital (HTGC) - add
American Electric Power (AEP)

Sells (week ending October 22)

Public Storage (PSA) - trim
Mid-America Apartment communities (MAA) - trim
Schwab U.S. Board Market ETF (SCHB) - trim
Upstart Holdings (UPST)
500 bushels of corn
200 bushels of soybeans

Advisor Trades

United Health Group (UNH) - partial sell

Future Topics

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

Mason Student Managed Investment Fund. Manya will return on November 17, as a follow-up to the SMIF presentation on October 13. We are working on regular updates from the SMIF on their trades as part of the Forum.

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 “Investment 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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