

## **INVESTMENT FORUM AGENDA FOR WEDNESDAY, NOVEMBER 3, 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.

Congratulations on OLLI's first hybrid class last week. While there were a number of "glitches" that have been documented by Paul Howard and will be addressed, reports are that it was a successful Forum for both in person and Zoom attendees. I will volunteer the Forum to do other test hybrid sessions in preparation for OLLI going live with hybrid classes in the Spring Term.

### **Markets**

Another nice up week, with markets at or near new all time highs, and recovering the modest pullback since Labor Day. (That was the first line from last week, repeated this week.) For this week, the DOW was up 0.4% %; the S&P was up 1.3%; the NASDAQ was up 2.3%; and the Russell 2000 was up 0.2%. A strong month. Third quarter earnings are good, with a few notable exceptions.

### **Topics This Week**

ESG Investing. Tom Kaufman, Brenda Bloch Young, David Breese, and Jim Dann with talk about companies and funds that have strong environmental, social, and governance records. They will address: ESG issues experienced as a lawyer; ESG labels, tools to search for ESG investments; and high performing funds of companies with strong ESG records. Questions and comments are invited during the discussions. The topic will continue to November 10, as needed.

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

## **Buys and Sells**

### Buys (week ending October 29)

(AMSL) - Dutch chip company  
Verizon (VZ) - add  
Walgreens Boots Alliance (WBA) - add  
IBM (IBM) - add  
Lockheed Martin (LMT) - add  
EvGO, Inc. (EVGO)  
SPDR Biotech ETF (XBI)  
Facebook (FB) - add  
Commercial Metals( CMC) - add  
shiva inu (crypto)  
Applied Materials (AMAT) - add  
Semler Scientific (SMLR) - add  
Palantir Technologies (PLTR)

### Sells (week ending October 29)

Twitter (TWTR)  
Genuine Parts (GPC) - trim  
Bank of America (BAC) - trim  
Qualcomm (QCOM) - trim  
Lockheed Martin (LMT)  
Advantage Energy (AAVVF)  
Carlyle Group (CG)

### Thinking About . . .

Polygon/Matic  
Matthews China Fund (MCHFX)

## **Future Topics**

Mason Student Managed Investment Fund. Many 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 “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 lists and other presentations.

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