

**INVESTMENT FORUM AGENDA FOR WEDNESDAY, DECEMBER 1, 2021
10:30AM**

We are meeting this week, December 1, as a “club,” at 10:30AM. Club meeting dates for the rest of 2021 are: 12/1, 12/8, and 12/15.

The Zoom Meeting ID: 828 4577 4172. Passcode: 590094. Dial in 301-715-8592. The link will also be sent out in the OLLI Daily Schedule, on Wednesday morning.

Registration for the Winter Term (January 24, 2022 to February 18, 2022,) will be from November 29 to December 7, 12 Noon.

Markets

Markets were down for the two weeks, topped off by the big Black Friday drop. For each of the past two weeks, the DOW was down 1.4% and 2.0%; the S&P was up 0.3% then down 2.2%; the NASDAQ was up 1.2%, then down 3.5%; and the Russell 2000 was down 2.9% and down 4.2%. Economic news (spending and jobless claims) were positive, but the pandemic zapped us once again. Was the Black Friday drip a buying opportunity? We may know by the time of our Wednesday Forum session.

Topics This Week

ESG (continued.) Jim Dann will look at funds with strong ESG ratings.

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

Buys and Sells

Buys (2 weeks ending November 26)

American Tower (AMT)

Crown Castle (CCI) add

Lyondell Basel Industries (LYB) - add (black Friday trade)

Lockheed Martin (LMT) - add (black Friday trade)
Owlrock Capital (ORCC) - add (black Friday trade)
Hercules Capital (HTGC) - add (black Friday trade)
Bristol Myers Squibb (BMY) - add
Verizon (VZ) - 2 buys
Equinix (EQIX)
VISA (V)
Wells Fargo (WFC)
iShares Core Dividend ETF (DGRO)
Paypal (PYPL) - add
iShares Core S&P Small Cap ETF (IJR)
Global X S&P 500 Covered Call ETF (XYLD)
Global X NASDAQ 100 Covered Call ETF (QYLD)
Orion Office REIT (ONL) - spin off
US Treasury I Bond via Treasury Direct

Sells (2 weeks ending November 26)

Coresite Realty (COR)
Orion Office REIT (ONL)
Kimco Realty (KIM) - trim
Pepsico (PEP) - trim
Public Storage (PSA) - trim (black Friday trade)
CyrusOne (CONE)
Kellogg (K)
NiSource (NI)
Royal Gold (RGLD)
Exxon Mobil (XOM)
AstraZeneca (AZN)
iShares Core S&P Small Cap ETF (IJR) - covered call sale
General Electric (GE)
Kyndryl Holdings (KD)
Orion Office REIT (ONL)

Thinking About

(VPL) - sell
Vanguard Energy ETF (VDE) - buy

Future Topics

Investment Forum 2022 market predictions. On December 8, we will take a Zoom survey, of your predictions for the price change of the S&P 500 for 2022. The choices will be: Zero to up 10%; up 10% to up 20%; up over 20%. And zero to down 10%; down 10% to down 20%; and down over 20%.

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.

Al Smuzynski
Investment Forum Moderator
asmuzynski@verizon.net