

INVESTMENT FORUM AGENDA  
WEDNESDAY, FEBRUARY 2, 2022, 11:50AM

The Winter Term will meet at 11:50AM on February 2, 9, and 16. We will then start meeting as a “club” on February 23 at 10:30AM until the beginning of the Spring Term on March 30.

The Zoom Meeting ID for the Winter Term is: 878 4902 7587.  
Passcode: 339 963. The link will be sent out in the OLLI Daily Schedule, on Wednesday mornings.

Welcome to the Investment Forum.

The usual format for the first sessions of new OLLI terms, (Forum history, do’s and don’ts, role of Investment Forum leaders, introduction of new members) will be this week, February 2. ***New members of the Investment Forum. Please consider introducing yourselves (what you did, how long you have been a member of OLLI, how long you have been an investor.*** And, if you wish, whether you pick your own investments, or use an advisor, whether you invest in individual stocks or funds, and why you joined us. ***All such participation is voluntary.***

Markets.

Despite a positive end of week and end of month, January was a big thud. For the month, the DOW was down 6%, the S&P was down 9%, and the NASDAQ was down 10%. Fed moves in 2022, inflation, political and international tensions, yada, yada, yada. The rest of fourth quarter earnings’ reports will be important. What will the rest of 2022 bring? Many pundits think the worst is behind us.

Topics this week.

*Poll from last week: How many investments do you own?*

Less than 10 positions = 10%

11-25 positions = 29%

26-40 positions = 29%

More than 40 positions = 32%

Bob Baker will look at the buys and sells.

### Buys and Sells

#### Buys (week ending January 28)

Microsoft (MSFT) -add  
Nvidia (NVDA) - add  
Intel (INTC) - add  
Getty Realty (GTY) - add  
Verizon (VZ) - add  
Apple (AAPL) - add  
Microsoft (MSFT) - add  
Amazon (AMZN) - add  
Vanguard Health Care ETF (VHT)  
Vanguard Mid-Cap Index (VIMAX)

#### Sells (week ending January 28)

Prudential (PRU) - trim

### Advisor Trades

Trimble (TRMB) - buy

### 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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