

INVESTMENT FORUM AGENDA
WEDNESDAY, MARCH 16, 2022, 10:30AM

We will meeting as a “club” at 10:30AM until the beginning of the Spring Term on March 30.

We will meet this week as a “hybrid” session. You may attend in person in TA-1, or by Zoom. To attend in person, you must download your proof of vaccination and take the daily health questionnaire to visit the Mason campus.

The Zoom meeting link and ID for the club sessions is 878 0150 2780
Passcode: 386 334.

Markets.

Another tough week, with the DOW down 2.0%; the S&P down 2.9%; the NASDAQ down 3.5%; and the Russell 2000 down 1.1%. The DOW and S&P are in a correction (down over 10%) and the NASDAQ is in a bear market (down over 20%.) The reasons are well known: the invasion of Ukraine and impact of economic sanctions, inflation, upcoming Fed moves, and oil prices.

Topics this week.

How to play global instability (continued)? Let’s hear more discussion on the risks and opportunities being driven by the invasion of Ukraine and economic sanctions, inflation, and energy prices? We have been talking about this for several weeks, but they loom so large, they deserve continuing discussion. And are we heading toward a recession?

Forum leadership will have some walk-on topics to discuss.



Bob Baker will look at the buys and sells.

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.

Al Smuzynski
Investment Forum Moderator
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Symbol	Description	Sector	Industry	News	Market Cap	P/E (ttm)
▼ BUY: 07 Mar - 11 Mar						
AMPLP	Alerian Mlp Etf	--	--		5.63B	--
SCHO	Sch St Us Trsr Etf	--	--		8.29B	--
VTIP	Vanguard Shrt Inf Prot	--	--		19.61B	--
XLE	Energy Select Sector	--	--		39.40B	4.03
T	A T & T Inc	Communication Services	Diversified Telecommunication Services		165.64B	8.42
AMZN	Amazon.Com Inc	Consumer Discretionary	Internet & Direct Marketing Retail		1,494.15B	42.98
BBBY	Bed Bath & Beyond	Consumer Discretionary	Specialty Retail		2.01B	--
EVGO	Evgo Inc	Consumer Discretionary	Specialty Retail		841.34M	--
GILD	Gilead Sciences Inc	Health Care	Biotechnology		72.63B	11.97
FCEL	Fuelcell Energy Inc	Industrials	Electrical Equipment		2.54B	--
GE	General Electric Co	Industrials	Industrial Conglomerates		100.40B	--
INTC	Intel Corp	Information Technology	Semiconductors & Semiconductor Equipment		190.00B	9.80
MNDT	Mandiant Inc	Information Technology	Software		5.05B	--
MPW	Medical Properties	Real Estate	Equity Real Estate Investment Trusts (REITs)		12.36B	18.32
STOR	Store Capital Corp	Real Estate	Equity Real Estate Investment Trusts (REITs)		8.07B	29.76
▼ SELL: 07 Mar - 11 Mar						
PGX	Pwrshrs Preferred	--	--		6.61B	--
VTI	Vanguard Total Stock	--	--		1,226.30B	6.92
BLK	Blackrock Inc	Financials	Capital Markets		106.00B	18.14
BRK/B	Berkshire Hathaway	Financials	Diversified Financial Services		720.20B	8.21
GS	Goldman Sachs Group	Financials	Capital Markets		106.46B	5.61
JPM	Jpmorgan Chase & Co	Financials	Banks		389.36B	8.69
AAPL	Apple Inc	Information Technology	Technology, Hardware, Storage & Peripherals		2,586.96B	27.09
MSFT	Microsoft Corp	Information Technology	Software		2,141.03B	30.73
TSM	Taiwan Semiconductr	Information Technology	Semiconductors & Semiconductor Equipment		537.20B	24.69
V	Visa Inc Cl A	Information Technology	IT Services		415.34B	33.10
▼ THINKING ABOUT: 07 Mar - 11 Mar						
FDX	Fedex Corp	Industrials	Air Freight & Logistics		58.10B	11.92
IIVI	Ii-Vi Inc	Information Technology	Electronic Equipment, Instruments & Components		6.83B	29.96