

INVESTMENT FORUM AGENDA
WEDNESDAY, MARCH 23, 2022, 10:30AM

We will meeting as a “club” at 10:30AM until the beginning of the Spring Term on March 30, at 11:50AM.

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.

Big week. The DOW was up 5.5%; the S&P was up 6.2%; the NASDAQ was up 8.2%; and the Russell 2000 was up 5.4%. What’s going on? All the worries of previous weeks - war, inflation, Fed and monetary policy, oil prices, are still worries. A “relief rally?” A “dead cat bounce?” Markets were oversold?

Topics this week.

How to play market and global instability (continued)? Dang it. We’re going keep talking about this until a clear market direction presents itself! Let’s hear more discussion on the risks and opportunities being driven by all the turmoil we are seeing. Will the Fed be able to cool inflation but not causing a recession? Comments by Larry Summers and David Rosenberg on the chances of “stagflation” and recession are worth reading.

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

Bob Baker will look at the buys and sells.

Upcoming topics

Business Development Companies. On April 13, David Toms will update us on BDCs.

REITs. On April 20, Bob Baker will update us on REITs.

David and Bob last talked about BDCs and REITs a year ago.

I welcome similar presentations of sectors and industries you follow closely.

Phillip Crooker (Tom's son) will talk about the pharma sector in April or May, date to be selected.

My Investor Journey. Over the years, a number of Forum members have given 10 to 15 minute presentations, "My Investor Journey." When they became investors. What they bought then. How their investment choices have evolved over time. Funds or individual investments. Investment goals. Allocations. What financial press you read. Use of advisors. Favorite investment services or websites. How much time you spend following the market. War stories. If you are willing to give such a talk, please let me know and we will schedule you.

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	Market Cap	P/E (ttm)	Ex-Date	Dividend Yield	Dividend
▼ BUY: 3/14 - 3/18								
VCIT	Vanguard Int Corp Bond	--	--	46.77B	--	03/01/20	3.06	2.66
GOOGL	Alphabet Inc Class A	Communication Services	Interactive Media & Services	1,774.08B	23.76	04/03/20	--	--
T	A T & T Inc	Communication Services	Diversified Telecommunication Services	165.64B	8.39	01/07/20	8.98	2.08
MCD	Mcdonalds Corp	Consumer Discretionary	Hotels Restaurants & Leisure	176.58B	23.72	02/28/20	2.31	5.52
CTRA	Coterra Energy Inc	Energy	Oil, Gas & Consumable Fuels	20.13B	10.25	03/04/20	2.40	0.60
EQNR	Equinor A S A F	Energy	Oil, Gas & Consumable Fuels	108.99B	12.25	05/12/20	2.05	0.71
OKE	Oneok Inc	Energy	Oil, Gas & Consumable Fuels	29.83B	19.30	01/28/20	5.55	3.74
ARCC	Ares Capital Corp	Financials	Capital Markets	9.77B	5.74	06/14/20	8.24	1.68
HTGC	Hercules Capital Inc	Financials	Capital Markets	2.08B	11.49	03/08/20	8.75	1.54
AAPL	Apple Inc	Information Technology	Technology, Hardware, Storage & Peripherals	2,621.23B	26.53	02/04/20	0.54	0.88
NVDA	Nvidia Corp	Information Technology	Semiconductors & Semiconductor Equipment	619.15B	63.63	03/02/20	0.06	0.16
GTY	Getty Realty Corp	Real Estate	Equity Real Estate Investment Trusts (REITs)	1.31B	20.31	03/23/20	5.79	1.64
▼ SELL: 3/14 - 3/18								
CHY	Calamos Convertible And	--	--	1.01B	3.08	03/11/20	8.49	1.20
QLCN	First Tr Clean Edge Us Liquid	--	--	2.50B	--	06/24/20	--	--
SCHD	Schwab Us Dividend	--	--	33.75B	--	12/08/20	2.86	2.25
SCHO	Sch St Us Trsr Etf	--	--	8.27B	--	03/01/20	0.38	0.19
LOW	Lowes Companies Inc	Consumer Discretionary	Specialty Retail	157.04B	19.21	04/19/20	1.36	3.20
CLX	Clorox Co	Consumer Staples	Household Products	16.35B	66.69	04/26/20	3.46	4.64
WMT	Walmart Inc	Consumer Staples	Food & Staples Retailing	402.24B	29.85	05/05/20	1.54	2.24
STLD	Steel Dynamics Inc	Materials	Metals & Mining	15.51B	4.82	03/30/20	1.62	1.36
PPL	Ppl Corp	Utilities	Electric Utilities	19.70B	--	03/09/20	3.00	0.80