

INVESTMENT FORUM AGENDA
WEDNESDAY, MAY 4, 2022, 11:50AM

We will meet for the Spring Term as a “hybrid” class, at 11:50AM. You may attend in person in TA-1, or by Zoom. To attend in person, you must download your proof of vaccination. The daily health questionnaire to visit the Mason campus is no longer required.

New OLLI name tags with a QR code are available in TA-1 when you next come to an in-person session. These can be scanned to sign in to in-person classes.

The Zoom meeting link and ID will be in the Daily Schedule, which will be forwarded by OLLI on Wednesday morning.

The Zoom Meeting ID is: 85936541391, Passcode: 903778

We are still looking for contributions to buy a camera for the back wall on TA-1. Please let Paul Howard know if you are willing to make a designated contribution to Friends of OLLI, to fund this.

Markets.

Worst four months, worst first four months of the year, in the last fifty years, the last seventy years, the last hundred years, since dinosaurs roamed the earth. Pick one. For the week, the DOW was down 2.5%; the S&P was down 3.3%; the NASDAQ was down 3.9% (down 21.2% YTD and in a bear market); and the Russell 2000 was down 4.0%. Another week with Friday the worst. Drivers were the usual suspects, with some bad earnings thrown into the mix. Like Amazon (AMZN).

Poll

What are you going to do (or have been doing) with the market dip? You can pick more than one. Include what your advisor is doing.

I am riding it out and making no major changes to my portfolios or allocations.

I am buying the dips and on the lookout for bargains.

I am reallocating to less risk - at least 20% of my portfolio to cash or low risk investments.

I am doing minor trimming or adding of positions and reallocations.

Topics this week.

The week that was. We will lead off our discussions with recent market moves.

"People have become so accustomed to buying the dip that they don't understand how to sell the rally." Ron Insana - CNBC.

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

Bob Baker will look at the buys and sells.

Upcoming topics

Pharma Phillip Crooker (Tom's son) will talk about the pharma sector on May 18.

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
asmuzynski@verizon.net

Buy/Sell list – week ending 04/29/22

Symbol	Description	Sector	Industry	Market Cap	P/E (ttm)	Ex-Date	Dividend Yield	Dividend
▼ BUY: 4/25 - 4/29								
SCHO	Sch St Us Trsr Etf	--	--	8.27B	--	05/02/20	0.39	0.19
VZ	Verizon Communicatn	Communication Services	Diversified Telecommunication Services	194.44B	9.43	04/07/20	5.51	2.56
AMZN	Amazon.Com Inc	Consumer Discretionary	Internet & Direct Marketing Retail	1,264.04B	42.64	--	--	--
BAC	Bank Of America Corp	Financials	Banks	287.66B	10.32	06/02/20	2.35	0.84
BK	Bank Of Ny Mellon Co	Financials	Capital Markets	33.98B	10.49	04/27/20	3.23	1.36
HTGC	Hercules Capital Inc	Financials	Capital Markets	1.99B	11.63	03/08/20	9.17	1.54
BAX	Baxter Interntnl	Health Care	Health Care Equipment & Supplies	35.77B	34.02	02/24/20	1.57	1.12
SWK	Stanley Black & Deck	Industrials	Machinery	18.14B	17.79	06/06/20	2.59	3.16
▼ SELL: 4/25 - 4/29								
KO	The Coca-Cola Co	Consumer Staples	Beverages	280.50B	27.66	06/14/20	2.72	1.76
AAPL	Apple Inc	Information Technology	Technology, Hardware, Storage & Periphera	2,555.12B	26.03	05/06/20	0.56	0.88
▼ THINKING ABOUT: 4/25 - 4/29								
I-BOND		--	--	--	--	--	--	--
MSFT	Microsoft Corp	Information Technology	Software	2,075.58B	29.56	05/18/20	0.89	2.48