

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

You may attend in person in TA-1, or by Zoom. The Zoom meeting link and ID will be in the Daily Schedule, which will be forwarded by OLLI on Wednesday morning.

We will meet as a “club” the following dates, at 10:30AM:

November 16
November 30
December 7
December 14
January 4
January 11
January 18

The Winter Term begins January 23; we will meet January 25, at 11:50AM. All OLLI classes in the Winter Term will be on-line only. The OLLI Spring Term will be hybrid

Registration for the OLLI Winter Term begins November 29. Catalogs are being mailed this week, and are available on-line now.

Markets.

Big week. The DOW was up 4.2%; the S&P was up 5.9%; the NASDAQ was up 8.1%, and the Russell 2000 was up 4.6%. Only the NASDAQ is now in bear market territory (down 27.6%) YTD. The big news was the moderating inflation numbers on Thursday, which raised hopes that the Fed will ease off on rate increases, and which sent stocks soaring. And the mid-term election results point to political gridlock, which is usually favorable for markets. Have we seen a bottom?

META and Elon Musk and Twitter continue to produce stories. And crypto. Another crash and burn, this time crypto exchange FTX, and a boy wonder, Sam Bankman-Fried, leaves many of us scratching our heads - what is crypto and is there any there, there?

Topics this week.

The week that was. Lot's happening domestically and globally. Is anybody making significant changes to allocations or strategy in response to what is going on?

Momentum investing and options. Charles Murphy will share his views on this strategy, in light of the current market.

Buys and Sells. Bob Baker will look at our trades for the past week.

Future topics

My Investor Journey. Paul Howard, and Joe Andricosky will be scheduled over the next few months. Please let me know if you are willing to share your journey as an investor.

Market Forecasts, 2023. We will take a poll of your market forecasts on December 14.

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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Buy/Sell list – week ending 11/11/22

Symbol	Description	Sector	Industry	Ex-Date	Market Cap	P/E (ttm)	Dividend Yield	Dividend Amount	Last Trade	% Chg frm 52 Wk High	% Chg frm 52 Wk Low
▼ BUY: 11/07 - 11/11											
T	A T & T Inc	Communication Services	Diversified Telecommunication Services	10/06/2022	135.75B	7.72	5.84	1.11	19.00	-11.75	+31.40
WWE	World Wrestling Entm	Communication Services	Entertainment	12/14/2022	5.60B	29.15	0.64	0.48	75.32	-5.65	+60.56
PG	Procter & Gamble	Consumer Staples	Household Products	10/20/2022	334.06B	23.71	2.60	3.65	140.15	-15.24	+14.71
WBA	Walgreens Boots Alli	Consumer Staples	Food & Staples Retailing	11/14/2022	35.68B	7.64	4.64	1.92	41.35	-24.82	+36.06
ABR	Arbor Realty Tr	Financials	Mortgage Real Estate Investment Trusts (REITs)	11/17/2022	2.56B	7.74	10.67	1.60	15.00	-24.85	+34.41
CSWC	Capital Southwest Corp	Financials	Capital Markets	12/14/2022	570.03M	11.09	11.70	2.28	19.48	-30.85	+19.66
HTGC	Hercules Capital Inc	Financials	Capital Markets	11/09/2022	1.81B	43.49	14.39	2.04	14.18	-25.72	+27.06
MET	MetLife Inc	Financials	Insurance	11/07/2022	58.45B	27.19	2.68	2.00	74.49	-1.51	+30.57
ORCC	Owl Rock Capital Corp	Financials	Capital Markets	11/29/2022	5.23B	11.31	9.88	1.32	13.36	-12.85	+31.24
TFC	Truist Finl Corp	Financials	Banks	11/09/2022	62.70B	10.23	4.40	2.08	47.26	-31.46	+18.12
AAPL	Apple Inc	Information Technology	Technology, Hardware, Storage & Peripherals	11/04/2022	2,336.43B	22.83	0.62	0.92	149.42	-18.32	+15.79
COHR	Coherent Corp	Information Technology	Electronic Equipment, Instruments & Components	--	5.37B	97.65	--	--	37.50	-86.53	+25.42
MPW	Medical Properties	Real Estate	Equity Real Estate Investment Trusts (REITs)	12/07/2022	7.24B	5.55	9.21	1.16	12.60	-47.78	+27.27
▼ SELL: 11/07 - 11/11											
SCHB	Schwab U.S. Broad Market	--	--	09/21/2022	20.06B	--	1.56	0.73	46.84	-17.95	+14.47
SCHO	Sch St Us Trsr Etf	--	--	11/01/2022	8.01B	--	0.97	0.47	48.27	-5.50	+0.84
VOO	Vanguard S&P 500	--	--	09/28/2022	841.19B	--	1.59	5.81	366.16	-17.02	+14.47
DIS	Walt Disney Co	Communication Services	Entertainment	12/13/2019	173.21B	57.09	--	--	95.52	-41.62	+10.71
AMZN	Amazon.Com Inc	Consumer Discretionary	Internet & Direct Marketing Retail	--	985.79B	80.87	--	--	100.76	-46.44	+17.34
GNTX	Gentex Corp	Consumer Discretionary	Auto Components	10/06/2022	6.87B	19.97	1.64	0.48	29.28	-22.74	+25.77
XOM	Exxon Mobil Corp	Energy	Oil, Gas & Consumable Fuels	11/14/2022	455.07B	9.32	3.19	3.64	114.00	-0.58	+96.69
AMGN	Amgen Inc.	Health Care	Biotechnology	11/16/2022	152.08B	23.42	2.73	7.76	284.24	-4.19	+43.09
BMY	Bristol-Myers Squibb	Health Care	Pharmaceuticals	10/06/2022	168.60B	25.94	2.84	2.16	75.95	-6.43	+42.71
GILD	Gilead Sciences Inc	Health Care	Biotechnology	12/14/2022	102.62B	31.15	3.59	2.92	81.37	-2.90	+42.35
LLY	Lilly Eli & Co	Health Care	Pharmaceuticals	11/14/2022	350.35B	55.12	1.11	3.92	353.50	-4.41	+52.46
MRK	Merck & Co. Inc.	Health Care	Pharmaceuticals	09/14/2022	248.37B	16.83	2.81	2.76	98.18	-5.38	+37.31
LMT	Lockheed Martin Corp	Industrials	Aerospace & Defense	11/30/2022	121.57B	22.63	2.57	12.00	467.00	-5.59	+42.29
AVGO	Broadcom Inc	Information Technology	Semiconductors & Semiconductor Equipment	09/21/2022	209.83B	20.80	3.17	16.40	517.65	-23.62	+24.71
SLGN	Silgan Holdings Inc	Materials	Containers & Packaging	11/30/2022	5.40B	13.71	1.30	0.64	49.05	-2.70	+27.11
▼ THINKING ABOUT: 11/07 - 11/11											
ANGPY	Anglo American Platinu F	Materials	Metals & Mining	08/11/2022	25.65B	7.02	8.31	1.36	16.37	-42.88	+55.76

CD Buys:

- 4.06% 3 mo CD (Schwab)
- 4.55% 6 mo CD (Schwab)
- 4.60% 9 mo CD (Fidelity)
- 4.95% 4 yr CD (Schwab)