

INVESTMENT FORUM AGENDA  
WEDNESDAY, JANUARY 22, 2025  
TALLWOOD TA-1, 11:50AM, and Zoom

Welcome to the Investment Forum! We have 134 registered this term, either in-person or Zoom, including quite a few new members. If you are new or newish and have not previously introduced yourself, please consider doing so in-person or on Zoom. Your name, what you did, how long you have been an investor, and why you joined us. (All participation is voluntary.)

The Zoom meeting link and ID will be in the Daily Schedule, which will be forwarded by OLLI on Wednesday morning. Regardless whether you registered for in-person or Zoom, you are welcome to join us in-person in Tallwood, TA-1.

Markets. Strong jobs' numbers from the previous week, along with inflation numbers not as bad as feared (2.9% CPI increase), and strong fourth quarter earning's numbers from banks, drove the markets higher. For the week, the S&P was up 2.9%, the NASDAQ was up 2.5% and the Russell 2000 was up 4.0%. Bond interest rates dropped slightly, and market consensus is that the Fed will lower rate only one time in 2025, as inflation concerns persist. Fourth quarter earnings will continue to come out, and will drive markets.

**Topics This Week.**

The Week that Was. David Toms will look at important numbers and market indicators. We will be looking for your views on the market, and changes in you investing strategy, and allocations, based on what you see ahead.

Buys, Sells, and Thinking Abouts. Bob Baker will look at the buys and sells, including from previous weeks that we have not looked at.

## **Future Topics**

Crypto and Bitcoin. David Toms will lead a discussion of crypto and Bitcoin, which he owns via an ETF. If you own or are thinking about buying crypto and Bitcoin, please share your views.

Strong vs. weak dollar. I would like to schedule a discussion of this topic. What is it, and what does it mean for trade, interest rates, and markets.

## **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 presentations.

Garrett Ruhl’s comments. Garrett follows economic news closely and sends out articles and comments on significant economic news by email several times a week, to a distribution list. You can get on his distribution list by contacting him at [gairoak@aol.com](mailto:gairoak@aol.com).

Al Smuzynski  
Investment Forum Moderator  
[asmuzynski@verizon.net](mailto:asmuzynski@verizon.net)

# Buy, Sell, Thinking About: w/e 01/17/25

BUY		BUY	
	Alphabet Inc. (GOOGL)		Rio Tinto plc ADR (RIO)
	Meta Platforms Inc. (META)		Southern Company (SO)
	Amazon.com, Inc. (AMZN)		Southern Company (SO)
	Cava Group, Inc. (CAVA)		Vistra Corp (VST)
	LVMH Moet Hennessy Louis Vuitton (LVMUY) [+]		Verizon Bond, 4.5820% YTM, 02/22/28 mat
	Equinor ASA ADR (EQNR) [+]		
	EQT Corp. (EQT)		
	Exxon Mobil Corp. (XOM) [+]		
FA	Deere & Co. (DE)	SELL	
	Salesforce Inc. (CRM)		Vangrd Cap'l Oppty Fund Adm Sh (VHCAX) [-]
	ServiceNow Inc. (NOW)		
	Nvidia Corp. (NVDA)	THINKING ABOUT	
	Shopify Inc. (SHOP)		

# Buy, Sell, Thinking About: w/e 01/17/25

Symbol	Description	Sector	Industry	Market Cap	P/E (ttm)	Ex-Date	Dividend Yield	Dividend	Last Trade	% Change	% Chg frm 52 Wk High
▼ BUY: 01/13 - 01/17											
GOOGL	Alphabet Inc Class A	Communication Services	Interactive Media & Services	2,369.71B	25.17	12/09/2024	0.41	0.80	196.05	+1.60	-2.67
META	Meta Platforms Inc	Communication Services	Interactive Media & Services	1,543.22B	28.06	12/16/2024	0.33	2.00	612.57	+0.24	-4.05
AMZN	Amazon.Com Inc	Consumer Discretionary	Consumer Discretionary Distribution & Retail	2,320.24B	46.56	--	--	--	226.40	+2.39	-2.83
CAVA	Cava Group Inc	Consumer Discretionary	Hotels Restaurants & Leisure	13.46B	243.52	--	--	--	118.50	+0.61	-31.28
LVMUY	Lvmh Moet Hennessy Lou F	Consumer Discretionary	Textiles, Apparel, & Luxury Goods	354.92B	23.30	11/29/2024	1.94	2.76	142.08	-1.45	-25.86
EQNR	Equinor Asa F	Energy	Oil, Gas & Consumable Fuels	68.14B	7.80	11/19/2024	9.60	2.40	25.00	-0.56	-15.20
EQT	Eqst Corp	Energy	Oil, Gas & Consumable Fuels	32.09B	75.69	11/06/2024	1.18	0.63	53.19	-1.52	-1.46
XOM	Exxon Mobil Corp	Energy	Oil, Gas & Consumable Fuels	489.26B	13.67	11/14/2024	3.52	3.96	112.40	+0.90	-11.03
DE	Deere & Co	Industrials	Machinery	119.59B	16.87	12/31/2024	1.42	6.48	455.96	+3.72	-2.86
CRM	Salesforce Inc	Information Technology	Software	306.24B	53.29	12/18/2024	0.49	1.60	325.00	+1.43	-11.92
NOW	Servicenow Inc	Information Technology	Software	218.11B	160.48	--	--	--	1,075.00	+1.35	-7.16
NVDA	Nvidia Corp	Information Technology	Semiconductors & Semiconductor Equipment	3,271.13B	52.03	12/05/2024	0.03	0.04	137.64	+3.10	-10.12
SHOP	Shopify Inc F	Information Technology	IT Services	133.73B	96.08	--	--	--	103.13	-0.14	-14.57
RIO	Rio Tinto Plc F	Materials	Metals & Mining	103.13B	9.11	08/16/2024	7.11	4.35	61.15	+2.19	-17.63
SO	Southern Co	Utilities	Electric Utilities	91.92B	19.12	11/18/2024	3.44	2.88	83.74	+0.01	-11.34
VST	Vistra Corp	Utilities	Independent Power & Renewable Electricity Prod	59.20B	32.82	12/20/2024	0.52	0.89	170.60	-1.80	-4.37
▼ SELL: 01/13 - 01/17											
VHCAX	Vanguard Capital Opportun	--	--	--	--	--	--	--	195.87	+0.52	-8.35
▼ THINKING ABOUT: 01/13 - 01/17											

## Fixed Income Buys:

- Verizon Communications Bond, 4.5820% YTM, 02/22/28 maturity

# Buy, Sell, Thinking About: w/e 01/17/25

