

INVESTMENT FORUM AGENDA  
WEDNESDAY, July 9, 2025  
TALLWOOD TA-1, 11:50AM, and Zoom

The Zoom meeting link and ID will be in the Daily Schedule, which will be forwarded by OLLI on Wednesday morning. The current Meeting ID is 8495 7435 886, Passcode 639 865, and should remain for the rest of the Summer Term. Regardless whether you registered for in-person or Zoom, you are welcome to join us in-person in Tallwood, TA-1. Parking is available on site or at the swimming pool parking lot next door.

**Markets.** Another good week, with the S&P and NASDAQ closing at all-time highs. For the week, the DOW was up 2.3%; the S&P was up 1.7%; the NASDAQ was up 1.6%; the Russell 2000 was up 3.5%; Bitcoin was up 2.9%; Gold was up 2.2%; and Treasury prices were down slightly/yields up. Drivers were positive trade negotiations with China and Vietnam, and strong jobs' creation numbers. And the BBB passed, with its higher US debt ahead.

**Topics This Week.**

**The Week in Review.** David Toms will look at market drivers from the past week: events and economic news that impacted markets, and where markets may be heading. David will also look at the three General Elections - GE Aerospace (GE), GE Vernova (GEV) and GE Healthcare (GEHC.) Is GE still bringing good things to life?

**Buys, Sells, and Thinking Aouts.** Bob Baker will look at this week's Buys and Sells, and Thinking Aouts.

**Future Topics**

Bob Baker will look at REITs. Ray Willson will look at the defense sector, and Jim Dann will look at managed foreign funds. Dates too be determined.

I would also like to schedule presentations on crypto, private equity, momentum investing, and gold. If you are knowledgeable and/or own these as investments, please let me know if you are willing to share your views.

### **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.

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# Buy, Sell, Thinking About: w/e 07/04/25

BUY		SELL	
	Alerian MLP ETF (AMLP) [+]		JPMorgan Nasdaq Equity Prem ETF (JEPQ) [-]
	Select STOXX Euro Aero/Def ETF ( <a href="#">EUAD</a> ) [+]		Schwab® S&P 500 Index Fund (SWPPX) [C]
	Nuveen Pref'd & Inc Opport'ies Fund (JPC)		Archer Aviation Inc. (ACHR) [C]
	Vanguard Cash Rsrvs Fed MnyMkt Fund (VMRXX)		
	Alphabet Inc. (GOOGL) [+]		
	Verizon Communications, Inc. (VZ) [+]		
	JPMorgan Chase & Co. (JPM)		
	Merck & Co Inc. (MRK) <b>[X2]</b> [+] [new]		
	Pfizer, Inc. (PFE) [+]		
	Alpha Architect Freedom 100 EM ETF (FRDM) [+]	THINKING ABOUT	
	Series I U.S. Savings Bond		Palantir Technologies Inc (PLTR)
	CD 4-yr 4.05% Non-Callable		Cloudastructure Inc (CSAI)
	CD 5-yr 4.05% Non-Callable		

# Buy, Sell, Thinking About: w/e 07/04/25

▼ Watchlist BUY: 06/30-07/04										
Symbol	Description	Sector	Industry	Market Cap	Beta	Ex Div....	Yield	Last	%Change	%Chg<52wkHi
AML	ALPS ALERIAN MLP ETF			4,044 M	0.42	5/14/25	7.98%	49.10	+0.33%	-7.78
EUAD	SELECT STOXX EUROPE ASPC DFN ETF			0	0.12	12/30/24	0.06%	41.76	+0.05%	NaN
JPC	Nuveen Preferred Income Opportunities Closed ...			2,612 M	0.13	7/15/25	9.83%	8.12	0.00%	-1.46
VMRX	VANGUARD CASH RESERVES FEDERAL M...			0	0.0	10/31/24	0.00%	1.00	0.00%	0.0
GOOGL	ALPHABET INC A	Communication Services	Interactive Media & Services	2,178,552 M	1.12	6/9/25	0.47%	179.53	+0.50%	-13.29
VZ	VERIZON COMMUNICATIO	Communication Services	Diversified Telecommunication Services	183,618 M	0.7	7/10/25	6.22%	43.55	-0.09%	-8.04
JPM	JPMORGAN CHASE & CO	Financials	Banks	822,606 M	1.09	7/3/25	1.89%	296.00	+1.86%	-0.13
MRK	MERCK & CO. INC.	Health Care	Pharmaceuticals	203,218 M	0.64	6/16/25	4.00%	80.93	-1.77%	-37.71
PFE	PFIZER INC	Health Care	Pharmaceuticals	144,295 M	0.63	7/25/25	6.78%	25.38	+0.24%	-19.53
FRDM	FREEDM 100 EMRG MKT	Industrials	Commercial Services & Supplies	0	1.01	6/27/25	3.37%	41.09	+0.81%	-0.7

▼ Watchlist SELL: 06/30-07/04										
Symbol	Description	Sector	Industry	Market Cap	Beta	Ex Div....	Yield	Last	%Change	%Chg<52wkHi
JEPQ	J P MORGAN NASDAQ EQT PRM INC ETF			0	0.79	7/1/25	10.95%	54.16	+0.33%	-7.48
SWPPX	SCHWAB S&P 500 INDEX			0	1.0	12/13/24	0.00%	97.03	+0.85%	0.0
ACHR	ARCHER AVIATION INC A	Industrials	Aerospace & Defense	5,583 M	6.23	N/A	N/A	10.17	+1.90%	-26.94

▼ Watchlist TA: 06/30-07/04										
Symbol	Description	Sector	Industry	Market Cap	Beta	Ex Div....	Yield	Last	%Change	%Chg<52wkHi
PLTR	PALANTIR TECHNOLOGIE A	Information Technology	Software	317,078 M	2.29	N/A	N/A	134.36	+1.70%	-9.35
CSAI	CLOUDASTRUCTURE INC A	Information Technology	IT Services	39 M	6.67	N/A	N/A	2.28	-0.87%	NaN

## Fixed Income Buys:

- Series I U.S. Savings Bond
- CD 4-yr 4.05% NC
- CD 5-yr 4.05% NC

# Buy, Sell, Thinking About: w/e 07/04/25

