

INVESTMENT FORUM AGENDA
WEDNESDAY, November 12, 2025
TALLWOOD TA-1, 11:50AM, and Zoom
Meeting ID: 8608 2658 362
Passcode: 286 680

This is the last session of the OLLI Fall Term. We will start meeting as a “club” starting next week, November 19, at 10:30AM, until the start of the OLLI Winter Term on January 20. We will not meet when OLLI is closed for the holidays.

Registration for the Winter Term will begin December 3. The Winter Catalogues will be sent out soon.

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.

Markets were down, driven by declines in tech and AI, and a report on Friday showing a large increase in job layoffs. For the week, the DOW was down 1.2%; the S&P was down 1.6%; the NASDAQ was down 3.0%; the Russell 2000 was down 1.9%; Bitcoin was up 1.5% (and breaking its 21% decline over the past month;) gold was down 0.1%; and Treasury prices were down/yields up.

Topics This Week.

The Week in Review. David Toms will discuss some of the news and economic data from the past week.

Buys, Sells, and Thinking Abouts. Lou Coglianese will look at the summary of buys and sells.

My investor Journey. Jonathan Fiechter will present his investor journey. Please consider a discussion of how you have evolved as an investor, and your current goals and investing style. See me for further details.

Future Topics

Introducing grandchildren to investing. I will share my current efforts to teach my 15 year-old step-grandson about markets, in hopes of making him an investor for life. I did this previously with a 14 year-old grandson, and prior to that, with my sons. With mixed success.

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 presentations.

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