

INVESTMENT FORUM AGENDA
WEDNESDAY, December 3, 2025
TALLWOOD TA-1, 10:30AM, and Zoom

I hope you had an enjoyable Thanksgiving!

We will be meeting as a “club” 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 were sent out last week. Be sure to register for both the Forum Winter Term and the Forum Winter Club.

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.

A good week, easing the pain of a dismal November. For the week:

DOW:: up 3.2% (up 12.2% YTD)

S&P: up 3.7% (up 16.5% YTD)

NASDAQ: up 4.9% (up 21.0% YTD)

Russell 2000: up 5.5% (up 12.5% YTD)

Bitcoin: up 4.7% (down 7.3% YTD)

Gold: up 3.7% (up 58.1% YTD)

Treasuries: price up/yield down

Markets drivers were tech and AI, once again, and 80% odds of the Fed dropping interest rates again at its December 10 meeting.

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 for the past two weeks.

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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Investment Forum Moderator
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Buy, Sell, & Thinking About (Week Ending 11/28/25)		OLLI-GMU Investment Forum 12/3/25	
Buy		Sell	
Goldman Sachs Nasdaq-100 Premium Inc ETF (GPIQ) [+]		Amgen (AMGN) [C]	
Meta Platforms Inc (META) [+]		Devon Energy Corp (DVN) [C]	
Blue Owl BDC (OBDC) [+]			
IShares MSCI Poland ETF (EPOL) [+]			
Resmed (RMD)			
BitWise 10 Crypto (BiTW)			
NIVIDIA (NDVA) - GTC limit order @ 175 on 11/12			
		Thinking about	
		CVS (CVS)	
Legend: [+] Add [-] Trim [C] Close [N] New [FA] Financial Advisor [#] number of members			

Buy, Sell, & Thinking About (Week Ending 11/21/25)		OLLI-GMU Investment Forum	11/26/25
Buy		Sell	
Procter & Gamble Company (PG) [N][FA]		UnitedHealth Group Inc. (UNH) [C][FA]	
Blue Owl Capital Corp Ordinary Shares (OBDC)		Fidelity Bitcoin ETF (FBTC)	
		First Trust US Equity Opportunities ETF (FPX) [-]	
		iShares Semiconductor ETF (SOXX) [-]	
		ProShares Pet Care ETF (PAWZ) [-]	
		Amazon (AMZN) [C]	
Blackstone Private Credit Fund bond 5.05% 9/10/2030, BBB, make whole, @97.2		IShares MSCI Germany ETF (EWG)	
		Thinking about	
		Bristol Myers (BMY)	
Legend: [+] Add [-] Trim [C] Close [N] New [FA] Financial Advisor [#] number of members			