

INVESTMENT FORUM AGENDA  
WEDNESDAY, DECEMBER 10, 2025  
TALLWOOD TA-1, 10:30 AM and Zoom  
Meeting ID: 8608 2658 362  
Passcode: 286 680

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

### **Forum Notes**

Today is the Forum's third Club session during this time between the Fall and Winter terms. All our meetings as a Club start at 10:30 AM.

Our next meeting will be on December 17th, at 10:30 AM here in TA-1

### **Markets**

Results of the major indices and markets last trading week, December 1-5

Index/Market	Opening Value (Dec 1, 2025)	Closing Value (Dec 5, 2025)	YTD % Change (as of Dec 5, 2025)
<b>S&amp;P 500</b>	6,812.3	6,870.40	+16.81%
<b>DJIA</b>	47,580.85	47,954.99	+12.72%
<b>NASDAQ</b>	23,172.34	23,578.13	+22.10%
<b>Russell 2000</b>	2,482.23	2,521.48	+13.18%
<b>Bitcoin (BTC)</b>	\$90,389.11	\$89,387.76	-2.19%
<b>Gold</b>	\$4,238.90	\$4,197.81	+60.71%
<b>10 Year Treasury Bond</b>	4.05%	4.139%	

*Source: Yahoo finance*

### **This Week's Topics**

#### **The Week in Review**

David Toms will recap some of the past week's economic, financial, and market news.

### AI and Portfolio Management

We'll take a brief look at AI tools available to assist financial advisors and individual investors with their portfolios.

### Buys, Sells, and Thinking Abouts

We will review the Buys, Sells, and Thinking Abouts submitted last week by Forum members.

### **Future Topics**

#### My Investor Journey

While members of the Forum may have similar investing strategies, each of us has followed our own path to arrive at our current strategy. Please consider sharing how you have evolved as an investor, your current goals and investing style with the Forum. Please see Al Smuzynski or me for further information.

### **Other**

#### Investment Forum Website

The Investment Forum website can 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 in the dropdown list. Please contact Jim Coile, the Webmaster with any presentation contributions, article suggestions, or improvements by email: [ctj44@icloud.com](mailto:ctj44@icloud.com). The website has current and past agenda, buy/sell lists and presentations.

Ray Willson

Investment Forum Associate Moderator

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Buy, Sell, & Thinking About	(Week Ending 12/5/25)	OLLI-GMU Investment Forum	12/10/25
Buy		Buy	
iShares Core MSCI Total International Stock ETF (IXUS) [+]		VanEck Preferred Securities ex Financials ETF (PFXF) [N]	
AstraZeneca (AZN) [N]		Fortinet Inc. (FTNT) [C]	
Blue Owl BDC (OBDC) [N]		Adobe Inc. (ADBE) [-]	
Blue Owl BDC (OBDC) [+]		Royal Bank of Canada (RY) [+]	
Gaming and Leisure Properties (GLPI) [+]		Uber Technologies Inc. (UBER) [+]	
VICI Properties (VICI)[+]		APA Corporation, 15 Oct 2028 maturity date, 4.3505% YTM	
Ares Capital (ARCC)[+]		Unum Group, 15 Dec 2028, 4.2426% YTM	
Morgan Stanley Emerging Markets Domestic Debt CEF (EDD) [+]		KRC- Kilroy Realty Corporation, 15 Dec 2028, 4.4558% YTM	
Amazon (AMZN) [+]			
JP Morgan Equity Premium Income ETF (JEPI)			
Legend:  [+] Add  [-] Trim  [C] Close  [N] New  [FA] Financial Advisor  [#] number of members			

Buy, Sell, & Thinking About (Week Ending 12/5/25)		OLLI-GMU Investment Forum	12/10/25
Sell		Thinking about	
Fidelity Advisor International Capital Appreciation Fd (FICQX)		Lenovo	
Verizon (V) [C]		iShares Top 20 U.S. Stocks ETF (TOPT)	
		Vanguard FTSE Developed Markets Index Fund ETF Shares (VEA)	
		Vanguard FTSE Developed Markets Index Fund ETF Shares (VWO)	
		Chevron Corp (CVX) [-]	
		Linde PLC (LIN) [-]	
		Merck & Co Inc (MRK) [-]	
		Texas Instruments Inc (TXN)[C]	
		Procter & Gamble Co (PG)[-]	
		Union Pacific Corp (UNP)[-]	
Legend: [+] Add [-] Trim [C] Close [N] New [FA] Financial Advisor [#] number of members			