

INVESTMENT FORUM AGENDA
WEDNESDAY, FEBRUARY 25, 2026
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.

A reminder that the Tallwood facility follows the GMU Fairfax campus schedule. When there is adverse weather, please check the daily schedule or other e-mail notice from OLLI for class status.

Forum Notes

We will continue to meet at 10:30 AM as the Investment Club until Wednesday, March 18.

OLLI's Spring Term will begin on Monday March 23rd. The first Spring Term meeting of the Investment Forum will be on Wednesday, March 25th at 11:50 AM here in TA-1.

Markets

Results of the major indices and markets last trading week, February 17 – 20.

| Index/Market | Opening Value (Feb 17, 2026) | Closing Value (Feb 20, 2026) | 12 month Change (as of Feb 20, 2026) |
|------------------------------|---|---|---|
| S&P 500 | 6,819.86 | 6,909.51 | 12.95% |
| DJIA | 49,525.37 | 49,625.97 | 12.34% |
| NASDAQ | 24,632.07 | 25,012.62 | 15.7% |
| Russell 2000 | 2,641.7 | 2,668.9 | 20.91% |
| Bitcoin (BTC) | 68,798.23 | 67,208.59 | -29.28% |
| Gold | 4,998.89 | 5,098.50 | 73.63% |
| 10 Year Treasury Bond | 4.05% | 4.08% | |

Source: Yahoo finance

This Week's Topics

Week in Review

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\$tmnt Forum” link in the dropdown list. Please contact Jim Coile, the Webmaster with any presentation contributions, article suggestions, or improvements by email: ctj444@icloud.com. The website has current and past agenda, buy/sell lists and presentations.

Ray Willson

Investment Forum Associate Moderator

ray2willson@gmail.com

Buy, Sell, & Thinking About for WE 02/20/2026

OLLI-GMU Investment Forum, 02/25/2026/

| Buy | Sell |
|--|---|
| iShares MSCI Japan ETF (EWJ) [+] | RTX Corporation (RTX) [-] [FA] |
| PGIM AAA CLO ETF (PAAA) [+] | Janus Detroit Street AAA CLO ETF (JAAA) [-] |
| ARK Space & Defense Innovation ETF (ARKX) | |
| iShares MSCI Emerging Markets ETF (EEM) [+] | |
| State Street Industrial Select Sector SPDR ETF (XLI) [+] | |
| Taiwan Semiconductor (TSM) [+] | Apple (AAPL) [-] |
| Applied Materials (AMAT) [+] | Microsoft (MSFT) [-] |
| Amphenol Corp (APH) [+] | Amazon (AMZN) [-] |
| Vale ADR (VALE) [+] | Google (GOOGL) [-] |
| Analog Devices (ADI) [N] | Cisco (CSCO) [C] |
| | Advanced Micro Devices (AMD) [C] |
| Honeywell (HON) [N] | |
| HTGC (Hercules Capital) [+][N] | |
| Getty Realty Corp (GTY) [+] | |
| | Thinking About |
| | Gilead (GILD) [+] |

Legend: [+] Add [-] Trim [C] Close [N] New [FA] Financial Advisor [#] number of members

As Corrected