

INVESTMENT FORUM AGENDA
WEDNESDAY, March 4, 2026
TALLWOOD TA-1, 10:30 AM, and Zoom

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. Plenty of seating is available and there is an extra dimension to classes in-person, that is not available on Zoom. Parking is available on site or at the swimming pool parking lot next door.

Registration for the Spring Term is open. The first Forum session in the Spring term is March 25, hybrid, at 11:50AM.

Markets.

A down week, with Nvidia's blowout earnings tanking the market. Huh? Then, inflation numbers came in hotter than expected. Utilities had the best week, and tech the worst. And what will this week bring, with the conflict in Iran? Oil prices will be up, quickly.

	<u>1 week change</u>	<u>12 month change</u>
DJIA	-1.3%	+11.7%
S&P 500	-0.4%	+15.5%
Russell 2000	-1.2%	+21.8%
Bitcoin	+3.5%	-22.9%
Gold.	+1.8%	+83.7%

Topics This Week.

The Week in Review. David Toms will be back with us, to do his presentation on important economic data from the past week, and other topics.

Buys, Sells, and Thinking Abouts. Lou Coglianesi will look at this week's Buys and Sells, and Thinking Abouts.

Other

Condolences. Long-time Forum member Kathy Rowan, Bob Baker's wife, passed away this past Friday. Remembrance arrangements will be shared when they are finalized.

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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Buy, Sell, & Thinking About for WE 02/27/2026

OLLI-GMU Investment Forum, 03/04/2026/

Buy	Sell
Amazon (AMZN) [+] [FA]	Alphabet (GOOGL) [-]
Broadbridge Financial Solutions (BR) [N] [FA]	Roche Holding AG (RHHBY) [FA] [C]
Vanguard Total Intl Stock fund (VXUS) [+]	Vanguard S&P 500 (VOO) [C]
Vanguard Europe fund (VGX) [+]	IShares S&P Momentum fund (SPMO) [-]
Corning (GLW) [N]	
Gilead (GILD) [+]	
IShares MSCE Chile ETF (ECH) [+]	
Invesco Aerospace and Defense ETF (PPA) [N]	Akre Focus ETF (AKRE) [-]
Lord Abbott Short Duration Hi-Yield bond (LSYAX) [N]	FAM Dividend Focus (FAMEX) [C]
PIMCO Income Fund (PONAX) [+]	
Vanguard Int'l Equity Developed Markets ETF (VEA) [+]	Vanguard S&P 500 (VOO) [—]
Vanguard Int'l Equity Emerging Markets ETF (VWO) [+]	
ONEOK Inc (OKE) [+]	Williams Companies Inc (WMB) [C]
Hercules Capital (HTGC) [+]	Alexandria Real Estate Equities Inc (ARE) [C]
Nvidia (NVDA) [+]	
Vanguard Total Bond Market Index Fund (BND) [+]	Thinking About
Vanguard Total International Bond Index Fund (BNDX) [+]	Fidelity International Multifactor ETF (FDEV)
Fidelity Total Bond ETF (FBND) [+]	Fidelity International High Dividend ETF (FIDI)
3.701% 6 week T Bill via Treasury Direct	
Blue Owl Technology Financial Corp, 6.70%, 4/20/2029	Novo Nordisk (NVO)

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