

INVESTMENT FORUM AGENDA
WEDNESDAY, MARCH 11, 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.

Registration for OLLI's Spring Term remains open. If you have not registered yet, please sign-up as soon as you can.

Forum Notes

Next week's meeting on March 18 will be the last as the Investment Club.

OLLI's Spring Term begins 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, March 2 - 6.

Index/Market	Opening Value (Mar 2, 2026)	Closing Value (Mar 6, 2026)	12 month Change (as of Mar 6, 2026)
S&P 500	6,824.36	6740.02	-1.73
DJIA	48,794.42	47,501.55	-1.82
NASDAQ	22,323.12	22,389.68	-3.65
Russell 2000	2,608.89	2,525.30	+0.68
Bitcoin (BTC)	68,785.08	66,081.32	-24.45
Gold	5,346.60	5,090.30	+16.51
10 Year Treasury Bond	4.01%	4.146%	

Source: Yahoo finance, Google, Marketwatch

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 03/06/2026

OLLI-GMU Investment Forum, 03/11/2026

Buy	Sell
Microsoft Corp. (MSFT) [+] [FA]	
Energy Transfer LP (ET)	
Plains All American Pipeline LP (PAA)	
Stevanato Group SpA (STVN)	
iShares Global Infrastructure ETF (IGF) [+]	
Vanguard Value ETF (VTV) [+]	
Vanguard Total International Stock ETF (VXUS) [+]	
SPDR Portfolio Emerging Markets ETF (SPEM) [+]	
Newmont Corporation (NEM) [+]	
Vanguard Industrials ETF (VIS) [+]	
Getty Realty Corp. (GTY) [N]	Goldman Sachs Nasdaq-100 Income ETF (GPIQ) [C]
Goldman Sachs Nasdaq-100 Income ETF (GPIQ) [+]	
Capital Southwest Corporation (CSWC) [+]	AES Corporation (AES) [C]
Vanguard S&P 500 ETF (VOO) [+]	SPDR S&P 500 ETF Trust (SPY) [C]
Goldman Sachs BDC Bond 5.35%, 2/10/29, YTM 5.8%	Blackstone Private Credit Fund Bond 9/10/2030
	Thinking About
	Vanguard Intermediate Corp Bond Fund (VCIT)

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