

INVESTMENT FORUM AGENDA
WEDNESDAY, March 18, 2026
TALLWOOD TA-1, 10:30 AM, and Zoom

The OLLI Spring Term begins next week. We will meet Wednesday, March 25 at **11:50AM** for the rest of the Spring Term.

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.

Markets.

A down week, the third straight, driven by soaring oil prices and the Iran war, and soft jobs' numbers and continued sticky inflation numbers. Markets are now down YTD, and the S&P is at its lowest level since November.

	<u>1 week change</u>	<u>YTD change.</u>	<u>12 month change</u>
DJIA	-2.0%	-3.1%	+12.2%
S&P 500	-1.6%	-3.1%	+17.6%
Russell 2000	-1.8%	-0.9%	+21.5%
Bitcoin	+2.2%	-18.2%	-12.2%
Gold.	-1.8%	+15.7%.	+67.4%

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

Preferred Stocks. On this week's Buy/Sell list, are two perpetual preferred stocks, bought by me. I will talk about them during the Buy/Sell list discussion.

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 "Investment 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.

Al Smuzynski
Investment Forum Moderator
asmuzynski@verizon.net

Buy, Sell, & Thinking About for WE 03/13/2026**OLLI-GMU Investment Forum, 03/18/2026**

Buy	Sell
ResMed Inc. (RMD) [+] [FA]	
Bank of America (BAC)	Corn and Soybeans (not yet planted)
Vanguard FTSE Emerging Markets ETF (VWO)	Vanguard Dividend Growth Fund (VDIGX) [C]
Goldman Sachs Nasdaq-100 Premium Income ETF (GPIQ) [+]	
Vanguard Intermediate-Term Corporate Bond Index ETF (VCIT) [+]	
Boeing (BA) [N]	NVIDIA Corp. (NVDA) [-]
Capital Southwest Corporation (CSWC) [+]	
Trinity Capital Inc. (TRIN) [+]	
Ares Capital Corporation (ARCC) [+]	
Apple Federal Credit Union CD 4.1% (70-week, ~16mo)	
Wells Fargo 4.75% Perpetual Preferred Stock, Callable (WFCPRZ)	GE Vernova (GEV) [-]
Capital One 5.00% Perpetual Preferred Stock, Callable (COFPRI)	
Amazon Com Inc Note, Make Whole, 5/12/2031, YTM 4.3%	

Thinking About

Space X IPO

Vanguard Value ETF (VTV) [+]

Apple Federal Credit Union CD 4.1% (70-Month)

Vivi Properties Inc [+]

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