

INVESTMENT FORUM AGENDA  
WEDNESDAY, April 1, 2026  
TALLWOOD TA-1, 11:50 A.M. 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**

This is the second session of the Investment Forum for the Spring Term. The last Spring Term meeting will be on Wednesday, May 13<sup>th</sup> at 11:50 AM here in TA-1.

For those new to the Forum, we extend the opportunity to introduce yourself, tell us briefly about your work history, reasons why you joined the Forum and your investment strategy.

**Markets**

Results of the major indices and markets last trading week, March 23-27.

<b>Index/Market</b>	<b>Opening Value (Mar 23, 2026)</b>	<b>Closing Value (Mar 27, 2026)</b>	<b>12 month Change (as of Mar 27, 2026)</b>
<b>S&amp;P 500</b>	6,574.96	6,368.85	-6.96%
<b>DJIA</b>	45,803.82	45,166.64	-6.03%
<b>NASDAQ</b>	21,995.78	20,948.36	-9.87%
<b>Russell 2000</b>	2,465.40	2,449.70	-2.04%
<b>Bitcoin (BTC)</b>	67,843.00	66,338.38	-24.16%
<b>Gold</b>	4,353.00	4,524.30	3.53%
<b>10 Year Treasury Bond</b>	4.386%	4.434%	--

*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](mailto:ctj444@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 for WE 03/27/2026**

**OLLI-GMU Investment Forum, 04/01/2026**

Buy	Sell
Gaming and Leisure Properties, Inc. (GLPI) [N]	GS Nasdaq 100 Core Premium Income ETF (GPIQ) [C]
Ares Capital Corp (ARCC) [+]	CVS Health Corp (CVS) [C]
Amazon.com, Inc. (AMZN) [+]	
Vanguard Growth ETF (VUG) [+]	
Fidelity International Index Fund (FSPSX) [N]	Fidelity 500 Index Fund (FXAIX) [C]
Vanguard Total Intl Bd ETF (BNDX) [N] [FA]	Vanguard FTSE Developed Markets ETF (VEA) [C] [FA]
Vanguard Intermediate-Term Inv-Gr Fund (VFIDX) [N] [FA]	Service Corporation International (SCI) [C] [FA]
	Novo Nordisk A/S (NVO) [C] [FA]
	ProShares Pet Care ETF (PAWZ) [C] [FA]
Apollo Global Management (APO) [+]	Navigator Holdings Ltd. (NVGS) [-]
Nu Holdings Ltd. (NU) [+]	CVR Energy, Inc. (CVI) [-]
Brookfield Corp (BN) [+]	SLB Limited (SLB) [-]
Equinor ASA (EQNR) [+]	Beacon Financial Corporation (BBT) [C]
EQT Corporation (EQT) [+]	iShares MSCI India ETF (INDA) [C]
Kilroy Realty Corp (KRC) Bond 8/2028 4.66%YTM	
Oracle Corp (ORCL) Bond 9/2029 4.59% YTM	
13 FDIC-Insured CDs [N] May & June 2026	
Vanguard Short-Term Corporate Bond ETF (VCSH) [+]	Fidelity Total Bond ETF (FBND) [-]
	Vanguard Int-Term Corp Bond ETF (VCIT) [-]
	<b>Thinking About</b>
	REalloys Inc (ALOY)
	Schwab U.S. Dividend Equity ETF (SCHD)
	Vanguard Global Capital Cycles Fund (VGPMX)

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