

INVESTMENT FORUM AGENDA
WEDNESDAY, April 29, 2026
TALLWOOD TA-1, 11:50 A.M. and Zoom
Meeting ID: 812 2246 3957
Passcode: 850 669

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.

Forum Notes

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

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

Markets

Last week saw the S&P 500 and the NASDAQ reach new highs despite lack of progress in negotiations between the U.S. and Iran.

Results of the major indices and markets last trading week, April 20-24.

| Index/Market | Opening Value (Apr 20, 2026) | Closing Value (April 24, 2026) | YTD Change (as of Apr 24, 2026) |
|------------------------------|---|---|--|
| S&P 500 | 7,117.05 | 7,165.08 | +4.8% |
| DJIA | 49,422.37 | 49,230.71 | +2.4% |
| NASDAQ | 24,338.01 | 24,836.60 | +6.1% |
| Russell 2000 | 2,771.14 | 2,787.00 | +11.39% |
| Bitcoin (BTC) | 73,854.25 | 77,455.31 | -10.05% |
| Gold | 4,793.90 | 4,722.30 | +6.82% |
| 10 Year Treasury Bond | 4.256% | 4.30% | -- |

Sources: Yahoo finance, Google, Marketwatch

This Week's Topics

Week in Review

David Toms will cover the highlights of the past week.

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\$tment 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 04/24/2026**OLLI-GMU Investment Forum, 04/29/2026****Buy**

Wolfspeed, Inc. (WOLF) [N]

PepsiCo, Inc. (PEP) [+] [FA]

Vanguard S&P 500 ETF (VOO) [+]

Vanguard PRIMECAP Fund (VPMCX) [+]

Vanguard Municipal Money Market (VMSXX) [+]

PIMCO Income Fund (PIRMX) [N]

Ultragenyx Pharmaceutical Inc. (RARE) [N]

Arthur J. Gallagher & Co. (AJG) [N]

Rocket Companies, Inc. (RKT) [+]

Sell

GS Nasdaq-100 Core Premium Income ETF (GPIQ) [C]

Vanguard Federal MMFs

American Tower Corp. (AMT) [C]

Pinnacle West Capital Corp. (PNW) [C]

Broadcom Inc. (AVGO) [-]

Advanced Micro Devices, Inc. (AMD) [-]

Taiwan Semiconductor Mfg. Co. (TSM) [-]

Amazon.com, Inc. (AMZN) [-]

iShares Core S&P Mid-Cap ETF (IJH) [C]

Regrets

Intel Corp. (INTC) [2]

Thinking About

PIMCO Inflation Response Multi-Asset Fund Class A (PZRMX)

Trane Technologies PLC

Vanguard Municipal MMF @ 3.47% Fed Tax Free

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