

INVESTMENT FORUM AGENDA  
WEDNESDAY, MAY 6, 2026  
TALLWOOD TA-1, 11:50 AM, and Zoom  
Meeting ID: 812 2246 3957  
Passcode: 850 669

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.**

Another up week, driven by good third quarter earnings being reported. The Fed kept rates unchanged, but future discord signaled on raising or lowering rates, and Chairman Powell's decision to remain on the Board of Governors. Uncertainty remains on the Iran War, the Strait of Hormuz, and the impact on global oil prices and supply chain disruptions.

	<u>1 week change</u>	<u>YTD change.</u>	<u>12 month change</u>
DJIA	+0.6%	+3.0%	+19.8%
S&P 500	+0.9%	+5.6%	+27.1%
NASDAQ	+1.1%	+8.6%	+39.7%
Russell 2000	+0.9%	+12.3%	+39.3%
Bitcoin	+3.0%	-11.3%	-18.0%
Gold.	-1.8%	+6.3%.	+42.0%

**Topics This Week.**

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

Buys, Sells, and Thinking Abouts. Lou Coglianese and Bob Baker will look at this week's Buys and Sells, and Thinking Abouts. Who will be the first to buy an autocallable ETF? Who can explain autocallable ETFs?

## **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 “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](mailto: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 05/01/2026**
**OLLI-GMU Investment Forum, 05/06/2026**

Buy	Sell
Advanced Micro Devices Inc (AMD) [2]	Advanced Micro Devices Inc (AMD) [C] [-]
Lam Research Corp (LRCX)	Gaming and Leisure Properties Inc (GLPI) [-]
Taiwan Semiconductor Manufacturing Co (TSM)	Verizon Communications Inc (VZ) [-]
Hercules Capital Inc (HTGC) [N]	
	Morgan Stanley (MS) [-]
	GE Vernova (GEV) [-]
	Wolfspeed Inc (WOLF) [C]
	Goldman Sachs Nasdaq-100 Premium Income ETF (GPIQ) [C]
	Vanguard Total Bond Market Index Fund ETF(BND) [-][FA]
Mondelēz International Inc (MDLZ) [+]	International Paper Co (IP) [C]
Nucor Corp (NUE) [+]	
Parker-Hannifin Corp (PH) [+]	
EPR Properties (EPR) Bond 4.9% YTM Aug 2029	
Genuine Parts Co (GPC) Bond 5.04% YTM Aug 2029	
Alerian MLP ETF (AMLP) [+]	NVIDIA Corp (NVDA) [-]
Trinity Capital Inc (TRIN) [+]	Alphabet Inc (GOOGL) [-]
Hercules Capital Inc (HTGC) [+]	
Ares Capital Corp (ARCC) [+]	
VICI Properties Inc (VICI) [+]	
	<b>Thinking About</b>
	CVS Health Corp (CVS)
	HA Sustainable Infrastructure Capital, Inc. (HASI) [-]
	Invesco S&P 500 Momentum ETF (SPMO)

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