

INVESTMENT FORUM AGENDA
WEDNESDAY, May 13, 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

Today is the last meeting of the Investment Forum for the Spring Term. Next Wednesday, May 20, we will begin the sessions of the Investment Forum as a Club at 10:30 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, as most earnings reports were favorable. With Iran's rejection, over the weekend, of the U.S. proposed settlement terms, oil prices climbed and stock futures were lower. Standby for further updates as the status of the conflict between the U.S. and Iran changes.

Results of the major indices and markets last trading week, May 4-8.

Index/Market	Opening Value (May 4, 2026)	Closing Value (May 8, 2026)	YTD Change (as of May 8, 2026)
S&P 500	7228.38	7398.93	7.59%
DJIA	49,416.66	49,609.16	3.28%
NASDAQ	25958.12	26247.08	12.9%
Russell 2000	2481.108	2861.21	15.3%
Bitcoin (BTC)	78,540.29	80,186.77	-7.01%
Gold	4,581.20	4,720.40	9.51%
10 Year Treasury Bill	4.438%	4.36%	--

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

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Buy, Sell, & Thinking About for WE 05/08/2026
OLLI-GMU Investment Forum, 05/13/2026

Buy	Sell
CVS Health (CVS) [N]	Vanguard Mid-Cap ETF (VO) [-]
Avidbank (AVBD) [+]	Vanguard Growth ETF (VUG) [-]
Intellia Therapeutics (NTLA) [N]	
Krystal Biotech (KRYA) [N]	
AppLovin Corp (APP) [+]	SPDR S&P 500 ETF Trust (SPY) [-]
Freedom 100 Emerging Markets ETF (FRDM) [+]	
NEOS Nasdaq 100 Hedged Equity Income ETF (QQQI) [+]	Nokia (NOK) [C]
Hercules Capital (HTGC) [N]	Ripple (XRP) [C]
	VictoryShares International High Div Volatility Wtd ETF (VISN) [C]
	Goldman Sachs Nasdaq-100 Core Premium Income ETF (GPIQ) [C]
Texas Instruments (TXN) [N]	Amphenol Corp (APH) [C]
	JPMorgan Chase & Co. (JPM) [-]
	Wells Fargo & Co. (WFC) [-]
Hercules Capital (HTGC) [+]	Advanced Micro Devices (AMD) [-]
Trinity Capital (TRIN) [+]	Apple Inc. (AAPL) [-]
	Alphabet Inc. (GOOGL) [-]
	Thinking About
Fiserv Inc. (FISV) Bond 1 July 2029, 4.8984% YTM	NVIDIA (NVDA) [-] & BroadCom (AVGO) [-]
AutoZone Inc. (AZO) Bond 15 July 2029, 4.5694% YTM.	Global X SuperDividend ETF (SDIV)
	Invesco Preferred ETF (PGX)
	Vanguard PRIMECAP Fund (VPMAX) [+]
	Vanguard International Core Stock Fund (VZICX) [+]
	Invesco S&P 500 Momentum ETF (SPMO) [+]

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