

INVESTMENT FORUM AGENDA  
WEDNESDAY, MAY 27, 2026  
TALLWOOD TA-1, 10:30 AM, and Zoom  
Meeting ID: 889 2943 9785  
Passcode: 382493

The Zoom meeting link and ID, which will change this week, 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.

Registration for the OLLI Summer term opened May 19. Be sure to register for both the Investment Forum class and club sessions.

**Markets.**

An up week, driven by shifting news on the Iran war, settlement progress and, of course, oil prices. Earning's reports continue to come in good, and excitement over some big IPOs coming out.

	<u>1 week change</u>	<u>YTD change.</u>	<u>12 month change</u>
DJIA	+2.1%	+5.2%	+28.8%
S&P 500	+0.9%	+9.2%	+24.3%
NASDAQ	+0.5%	+13.4%	+40.6%
Russell 2000	+2.7%	+36.3%	+82.6%
Bitcoin	-0.5%	-13.9%	-29.1%
Gold.	-1.6%	+3.9%.	+33.6%
Treasury bonds (TLT)	+1.2%	-2.7%	-0.2%

**Topics This Week.**

The Week in Review. David Toms will look at his presentation of recent economic numbers and market moves.

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

## **Other**

The Simple Portfolio. While we will continue to look closely at stocks and our buys and sells, we hope to spend more time looking at portfolios of five to ten ETFs, rebalanced periodically, for the many of you who are not stock picking and obsessing over the latest earnings report, P/E and PEG ratios, and actively trading. We are looking for members willing to share their experiences and lessons learned.

Celebrations of Life for Kathy Rowan and Sy Sherman. The GMU Department of Communication and Bob Baker's family will be holding a Celebration of Life for his wife, Kathy Rowan, on Sunday, June 14 from 2:00PM to 5:00PM at GMU's Johnson Center Bistro. The Bistro room is located on the bottom level of the Johnson Center, across from WGMU radio station and Starbucks. If attending, please email Maria Carabelli at [mverdino@gmu.edu](mailto:mverdino@gmu.edu) to RSVP and for information on location and parking.

Long time Forum member Sy Sherman died Thursday, May 21. Services were held on Sunday, May 24, at Northern Virginia Hebrew Congregation and burial in Falls Church. Family will be hosting a reception on Monday, May 25 from 2-6PM 4809 King Richard Drive, Annandale.

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 05/22/2026****OLLI-GMU Investment Forum, 05/27/2026**

Buy	Sell
Invesco Variable Rate Preferred ETF (VRP)	Micron (MU) [-]
Plug Power Inc (PLUG) [N]	Vanguard FTSE Emerging Markets ETF (VWO)
Temu Space Innovators ETF (NASA) [N]	
Walmart Inc (WMT) [N] [+] [2]	
NextEra Energy Inc (NEE) [N]	Old National Bank bond due 9/2026 [C]
Microsoft Corp (MSFT) [+]	Kinder Morgan Inc (KMI) [-]
Amazon.com Inc (AMZN) [+]	Alphabet Inc (GOOGL) [-]
	<b>Thinking About</b>
	Paychex Inc (PAYX)
	Rigetti Computing (RGTI)
	D-Wave Quantum Inc (QBTS)
	iShares MSCI South Korea ETF (EWY) [+]

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