

INVESTMENT FORUM AGENDA
WEDNESDAY, June 10, 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

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

Next Wednesday, June 17, will be the last club session of the Investment Forum for this portion of the OLLI calendar. The Investment Forum's Summer term will begin on June 24; class time will change to 11:50 AM.

Markets

Last week saw the markets end the week with sell-offs not seen for a long time. Standby for further changes as the markets respond to both economic changes and impacts stemming from the geopolitical situations.

Results of the major indices and markets last trading week, Jun 1-5.

Index/Market	1 Week Change	YTD Change	1 Year Change
S&P 500	-2.59%	7.86%	23.06%
DJIA	-0.32%	5.83	18.95%
NASDAQ	-4.7%	10.62%	31.64%
Russell 2000	-2.94%	14.17%	32.89%
Bitcoin (BTC)	-11.58%	-28.01%	-41.99%
Gold	-3.87%	0.18%	29.68%
10 Year Treasury Bill	+12 bp	+40.10 bp	+9.50 bp

This Week's Topics

Week in Review

David Toms will cover the highlights of the past week.

Buys, Sells, and Thinking Abouts.

Lou Coglianesi and Bob Baker will look at this week's Buys and Sells, and Thinking Abouts. We will continue to use AI as part of our analyses.

Other

Portfolio Allocation:

Al Smuzynski will review his portfolio allocation and rationale.

We are looking for other members willing to share their experiences and lessons learned.

Celebration of Life for Kathy Rowan.

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 to RSVP and for information on location and parking.

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 "Investment 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. The website has current and past agendas and buy/sell lists and presentations.

Ray Willson

Investment Forum Associate Moderator

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Buy, Sell, & Thinking About for WE 06/05/2026	OLLI-GMU Investment Forum, 06/10/2026
Buy	Sell
Walmart (WMT) [N] [FA]	Marvell Technology Inc. (MRVL) [-] [FA]
PGIM AAA CLO ETF (PAAA)	
Vanguard High-Yield Corporate Fund (VWEAX) [N]	
BillionToOne, Inc. (BLLN) [N]	
	Tema Space Innovators ETF (NASA) [C]
	SPDR S&P 500 ETF Trust (SPY) [-]
D-Wave Quantum Inc. (QBTS) [N]	
	Vanguard 500 Index Fund (VFIAX) [-]
Hercules Capital, Inc. (HTGC) [+]	HASI Sustainable Infrastructure Capital, Inc. (HASI) [-]
	International Business Machines Corp. (IBM) [-]
	Broadcom Inc. (AVGO) [-]
	Thinking About
	Fed rate hikes (no LT bond purchases planned)
	Vanguard Growth ETF (VUG)

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