

INVESTMENT FORUM AGENDA  
WEDNESDAY, June 17, 2026  
TALLWOOD TA-1, 10:30 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.

Today is the last club session of the Investment Forum for this portion of the OLLI calendar. The Investment Forum's Summer term begins next Wednesday, June 24; class time will change to 11:50 AM.

**Markets**

Last week saw the markets started slow but ended upbeat due to the SpaceX IPO. It will again be an interesting market week as terms of the proposed (at this time) settlement with Iran are released. 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 8-12.

<b>Index/Market</b>	<b>1 Week Change</b>	<b>YTD Change</b>	<b>1 Year Change</b>
<b>S&amp;P 500</b>	+0.65%	+8.56%	+24.33%
<b>DJIA</b>	+0.66%	+6.53%	+21.34%
<b>NASDAQ</b>	+0.70%	+11.39%	+33.40%
<b>Russell 2000</b>	+3.90%	+18.62%	+40.16%
<b>Bitcoin (BTC)</b>	+3.33%	-25.20%	-39.76%
<b>Gold</b>	-0.33%	+0.17%	+27.48%
<b>10 Year Treasury Bill</b>	-0.073%	+0.337%	+0.037%

## **This Week's Topics**

### Week in Review

David Toms will cover the highlights of the past week.

### Buys, Sells, and Thinking Abouts.

Lou Coglianese 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:

Lou Coglianese will discuss portfolio allocation and rationale.

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

### 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.

Ray Willson

Investment Forum Associate Moderator

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**Buy, Sell, & Thinking About for WE 06/12/2026**

**OLLI-GMU Investment Forum, 06/17/2026**

**Buy**

**Sell**

NextEra Energy (NEE) [+]

PGIM AAA CLO ETF (PAAA) [+]

Defiance Daily 2X SpaceX ETF (SPCX) [N]

Space Exploration Technologies Corp. (SPCX) [N]

Ares Capital Corporation (ARCC) [+]

Kimco Realty Corp. (KIM) [C]

Amcor plc (AMCR) [+]

Goldman Sachs Nasdaq-100 Income ETF (GPIQ) [+]

Vanguard Short-Term Investment-Grade Fund (VFSUX)

Vanguard Intermediate-Grade Fund (VFIDX) [-]

Petróleo Brasileiro S.A. (PBR.A) [N]

400 Bu Corn (in the ground)

**Thinking About**

Defiance Daily 2X SpaceX ETF (SPCX)

Watching the impact of SPCX on index funds

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