

INVESTMENT FORUM AGENDA  
WEDNESDAY, JUNE 24, 2026  
TALLWOOD TA-1, 11:50 AM, and Zoom

**Welcome to the Investment Forum!** We have 133 registered this term (51 in-person and 82 on Zoom), including some new members. If you are new or newish and have not previously introduced yourself, please consider doing so. Your name, what you did, how long you have been an investor, and why you joined us. And turn on your camera, we want to see you! (All participation is voluntary.)

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.

**Markets.**

An up week, with some volatility and reactions to the Iran deal, and mixed reactions to the Fed meeting on Wednesday, the first under Chair Warsh.

	<u>1 week change</u>	<u>YTD change.</u>	<u>12 month change</u>
DJIA	+0.9%	+6.6%	+22.2%
S&P 500	+1.4%	+9.4%	+25.7%
NASDAQ	+3.1%	+14.3%	+36.4%
Russell 2000	+1.2%	+18.8%	+41.3%
Bitcoin	-3.6%	-27.9%	-37.5%
Gold.	+0.5%	-2.8%.	+24.8%
Treasury bonds (TLT)	+1.4%	-0,4%	+0.3%

**Topics This Week.**

Introductions. As we do with the first session of each OLLI term, we will introduce the Forum moderators and what they do, and some of our do's and don'ts, for the benefit of our new members. Then invite the new members to introduce themselves.

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

Artificial Intelligence. Tom Crooker will summarize an article about AI and retail investors.

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

### **Other**

Portfolio Allocations. On July 1, Tim Burniston, a newer member, will discuss his portfolio allocations and why. Please consider doing something similar. Reach out to me or Ray to further discuss and set up a presentation date.

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 06/19/2026	OLLI-GMU Investment Forum, 06/24/2026
Buy	Sell
Health Care Select Sector SPDR Fund (XLV) [N]	NEOS Nasdaq 100 Hedged Equity Income ETF (QQQI) [C]
Consumer Staples Select Sector SPDR Fund (XLP) [N]	Amazon.com, Inc. (AMZN) [C]
iShares Core MSCI Total International Stock ETF (IXUS) [+]	Intel Corporation (INTC) [C]
iShares Core S&P Mid-Cap ETF (IJH) [+]	
PGIM AAA CLO ETF (PAAA) [N]	PGIM AAA CLO ETF (PAAA) [C]
Space Exploration Technologies Corp (SPCX) [N]	
TEMA ETF Trust Space Innovation ETF (NASA) [N]	GM 4.35% bond, mature 1/17/2027
Vanguard PRIMECAP (VPMAX)	
Vanguard S&P 500 (VOO)	
Advanced Micro Devices, Inc. (AMD) [+]	Taiwan Semiconductor Manufacturing Company Limited (TSM) [-]
Microsoft Corporation (MSFT) [+]	Gilead Sciences, Inc. (GILD) [-]
Pfizer Inc. (PFE) [+]	
Ares Capital Corporation (ARCC) [+]	
VICI Properties Inc. (VICI) [+]	
iShares MSCI India ETF (INDA) [+]	
NextEra Energy, Inc. (NEE) [N]	
T. Rowe Price Intermediate Municipal Income ETF (TAXE) [N]	
Marsh & McLennan Companies, Inc. (MRSH) [N]	Abbott Laboratories (ABT) [C]
Marvell Technology, Inc. (MRVL) [N]	Marvell Technology, Inc. (MRVL) [C]
Zoetis Inc. (ZTS) [N]	
Host Hotels & Resorts, Inc. Bond 12/15/2029 4.75% YTM [N]	
Southwest Airlines Co. Bond 11/15/2028 4.79% YTM [N]	
Roper Technologies, Inc. Bond 09/15/2029 4.58% YTM [N]	400 Bu Corn (in the ground)
	Thinking About
	Invesco QQQ Trust (QQQ) [-]
	Invesco NASDAQ 100 ETF (QQQM) [-]
Legend: [+] Add [-] Trim [C] Close [N] New [FA] Financial Advisor [#] number of members	