

INVESTMENT FORUM AGENDA
WEDNESDAY, July 22, 2026
TALLWOOD TA-1, 11:50 A.M. and Zoom
Meeting ID: 863 6322 6951
Passcode: 359 086

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.

New Members If you are new and have not introduced yourself, please consider doing so. Your name, what you did, how long you have been an investor, and why you joined us. You can do this in-person or on Zoom.

Portfolio Allocation:

Thanks to those who have shared their portfolio allocation and rationale with us. We are looking for other members willing to share their experiences and investment strategies. Please let me or Al know.

Forum Notes

Markets

Last week, the major U.S. equity indices all lost ground, the S&P 500, the DJIA, NASDAQ, and Russell 2000. BITCOIN traded mostly sideways with little movement. The Russell 2000 declined the least as investors moved out of large cap tech stocks. Gold increased in price as the traditional safe haven. Yield on 10 year US Treasury bonds rose slightly due to higher oil prices and inflation concerns. (ChatGPT, Yahoo finance)

Results of the major indices and markets last trading week, Jul 13-17.

Index/Market	1 Week Change	YTD Change	1 Year Change
S&P 500	-1.6%	8.9%	20.63%
DJIA	-0.9%	8.5%	18.39%
NASDAQ	2.9%	9.8%	27.67%
Russell 2000	-0.5%	19.4%	33.25%
Bitcoin (BTC)	1.24%	-26.36%	-45.19%
Gold	.004%	-7.27%	19.85%
10 Year Treasury Bill	-0.13%	-.0.07%	.017%

This Week's Topics

Week in Review

David Toms will cover the highlights of the past week.

Buys, Sells, and Thinking Abouts.

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

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. 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: w/e 07/17/26

BUY		SELL	
	Nebius Group N.V (NBIS) [N]		Caretrust REIT Inc. (CTRE) [-]
	Accenture PLC (ACN) [N]		Abbvie Inc. (ABBV) [-]
	Main Street Capital (MAIN) [N]		U.S. Bancorp (USB) [-]
	GS Nasdaq 100 Prem Income ETF (GPIQ) [+]		Regions Financial (RF) [-]
	GS S&P 500 Premium Income ETF (GPIX) [+]		KeyCorp (KEY) [-]
	Vici Properties Inc. (VICI) [+]		
	NEOS Russell 2000 High Income ETF (IWMI) [+]		
SELL		THINKING ABOUT	
	Meta Platforms Inc. (META) [-]		Nebius Group N.V (NBIS)
	Alphabet Inc. (GOOGL) [-]		Accenture PLC (ACN)
	Navigator Holdings Ltd (NVGS) [-]		Four Corners Property Trust (FCPT)
	Petrobras (PBR) [C]		