

Welcome to the OLLI Investment Study Group (OISG)

Your facilitators are Bruce Crawford and Genie Floyd

Our Fall 2023 seminar will meet Wednesdays from 10:45 am - 12:00 pm (Eastern) via

Zoom. The course webpage is:

<https://udel.edu/~oisg>

Note that there is no “www” in the internet address.

The course format is a participant-led seminar. The idea is for class members to volunteer to make presentations to the rest of the class on investment topics of interest. You are not required to sign up for a class presentation -- you may just listen and take part in the discussions if you so choose. We would encourage you, however, to participate fully and sign up to share your thoughts with your peers.

In the first class session (September 6, 2023), we will provide you with an introduction to the course and information about the various resources that are available to you as a student/instructor. Also during the first session, we will go over the rules of the road on how the class works and give you suggestions on how to come up with good presentation topics. We will also be introducing you to the course website.

In our second class (September 13, 2023), we will walk you through the research and presentation creation process, showing you how to take a topic of general interest, put your own personal spin on it and then relate it back to investing.

Mission statement:

Rather than simply looking at individual stocks in isolation, this advanced investment course strives to help participants explore a variety of investment strategies and to understand the broader economic, environmental, geopolitical, societal and technological macro-level themes that are likely to move entire equity markets at once. These and other event types may, at times, move stocks in select S&P sectors in unison and/or may affect smaller groupings of seemingly unrelated companies simultaneously. We want to explore how these mechanisms work.

The participant-led seminar consists of two types of class sessions:

Student and/or guest speaker presentations of up to 30-45 minutes in length on various investment strategies as well as on economic, environmental, geopolitical, societal and technological issues (and their implications for investments). Plenty of time will be allocated for participants to engage in Q&A and discussion related to the topic of the week during and following the presentations. (Individual stock picks and exchange traded funds may also be discussed)!

Skill-building exercises (with plenty of interaction) designed to furnish students with the skills needed to successfully navigate the investment world.

Recent examples: Foundations of equity research
(class type 1)

Timing triple screen entries and exits with monthly charts
(class type 2)

Again, we thank you for your interest and welcome to the seminar!

Bruce Crawford & Genie Floyd
Osher Lifelong Learning Institute at the University of
Delaware March 27, 2023