

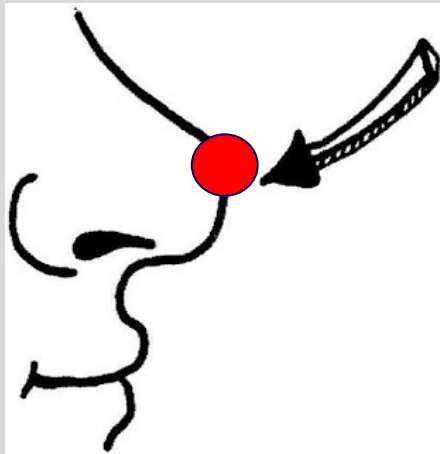
Investing for Successful Retirement

UD Osher – OLLI
Spring 2024

- **Rajeev A. Vaidya**
- **Ron Materniak**
- **Jane Roe-Fox**

Disclaimer in plain language

Disclaimer – in plain language:



Opinions are like noses, everyone has one !

You are going to see mine in this course !!

We are simply sharing our perspective.

This is not investment advice or recommendation.

Ron, Jane and I are not a financial advisors.

This course is for educational purposes only.

Form your own opinion, make your own investment decisions.

Second Class – Feb. 14th

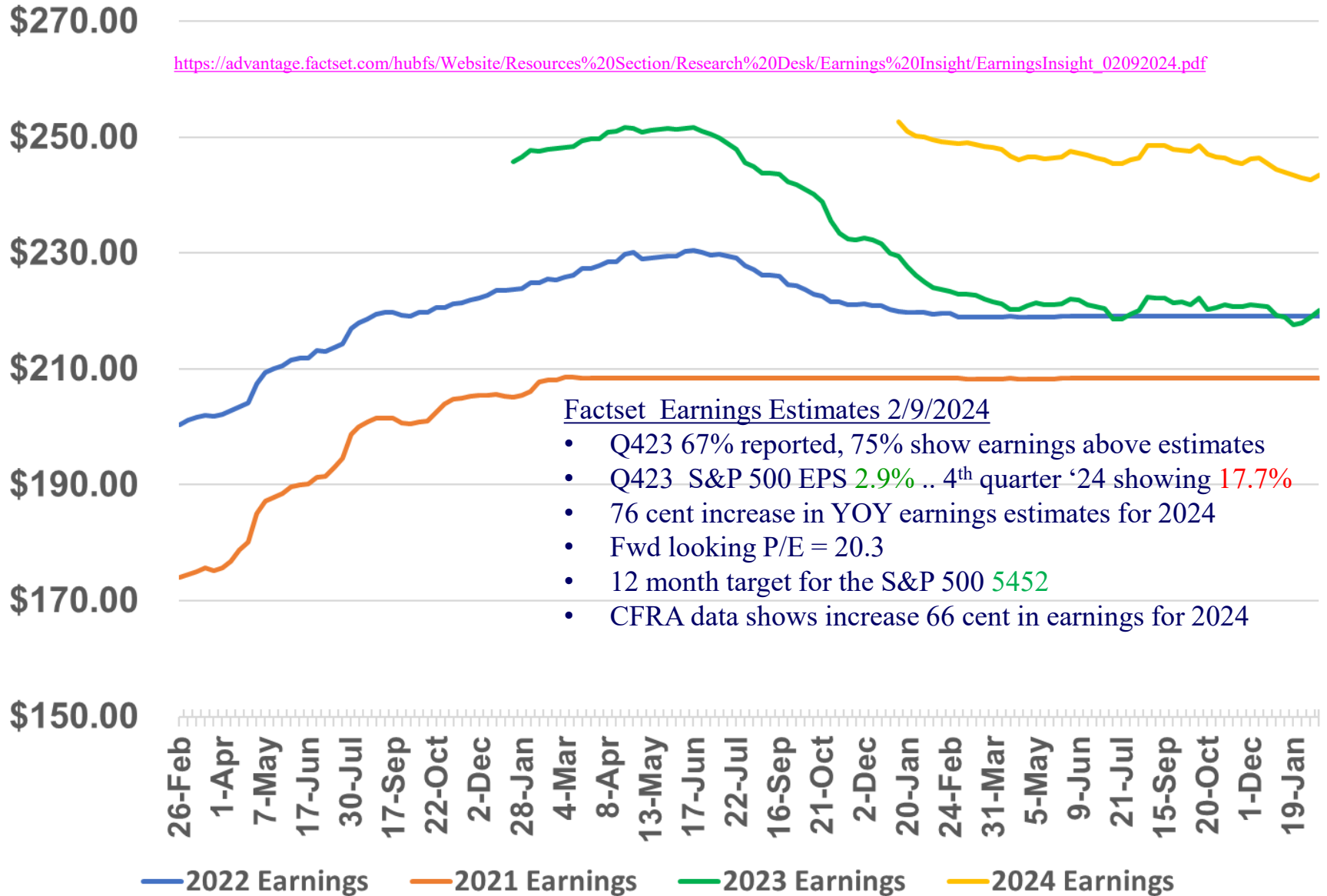
- Class Introduction
- The US Economy – Dr. Robert Fry
- Current State of the market - Rajeev

Second Class – Feb. 14th

- Class Introduction
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Factset(R) - S&P 500 Calendar year earnings forecast

https://advantage.factset.com/hubfs/Website/Resources%20Section/Research%20Desk/Earnings%20Insight/EarningsInsight_02092024.pdf



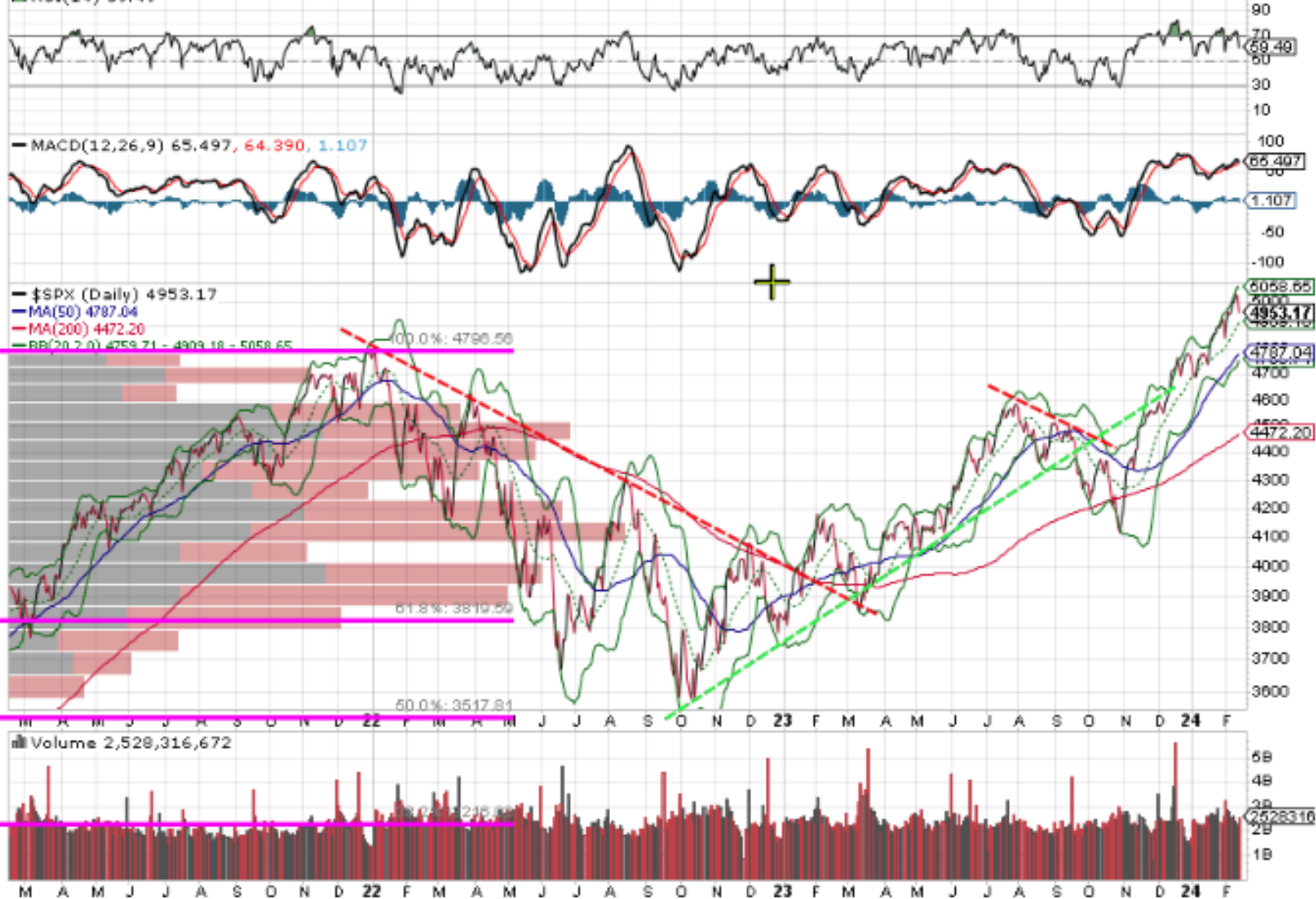
\$SPX S&P 500 Large Cap Index INDX

13-Feb-2024

Open 4967.94 High 4971.30 Low 4920.31 Close 4953.17 Volume 2.5B Chg -68.87 (-1.37%)

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▲ RSI(14) 59.49



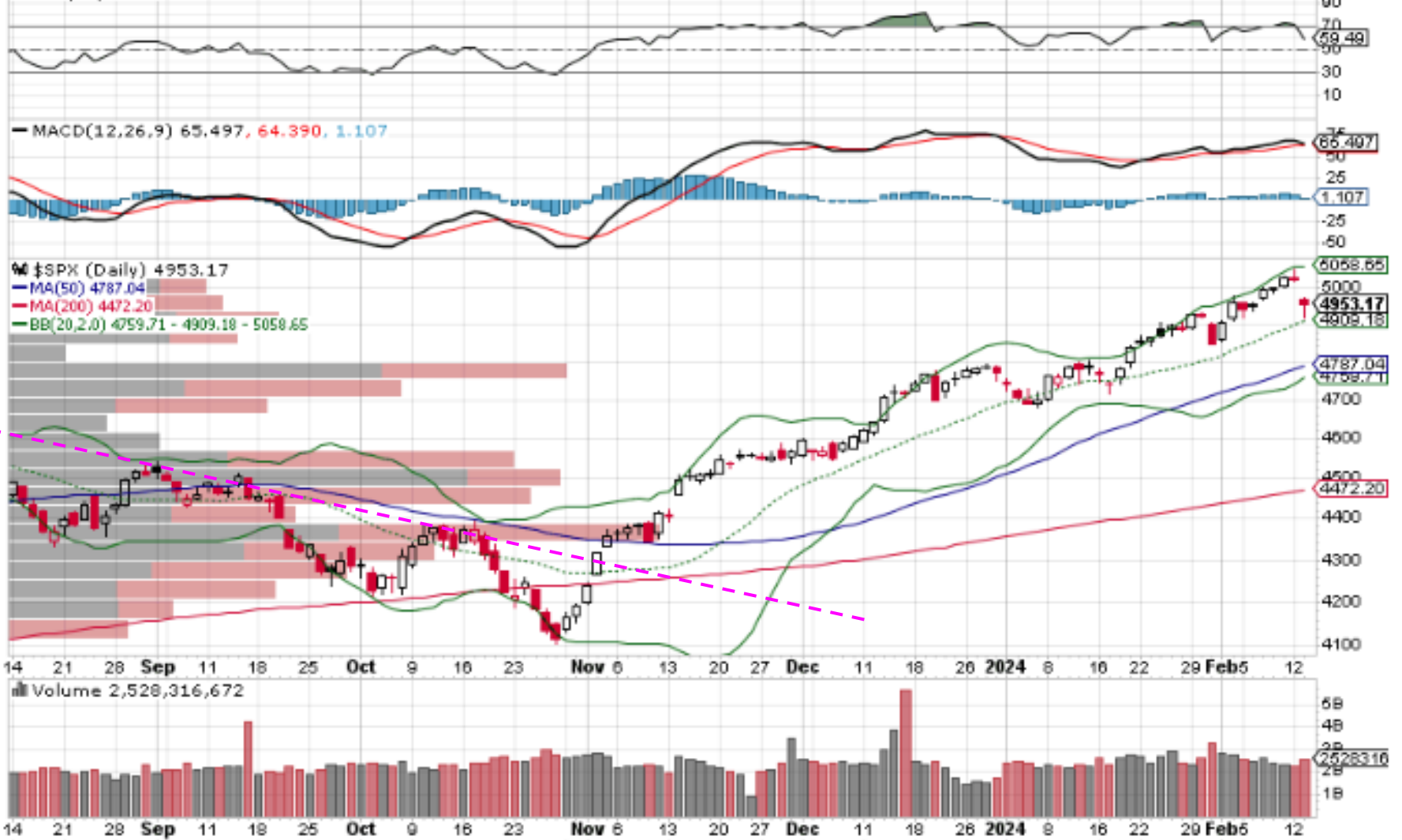
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\$NYAD NYSE - Advance-Delay Issues INDX

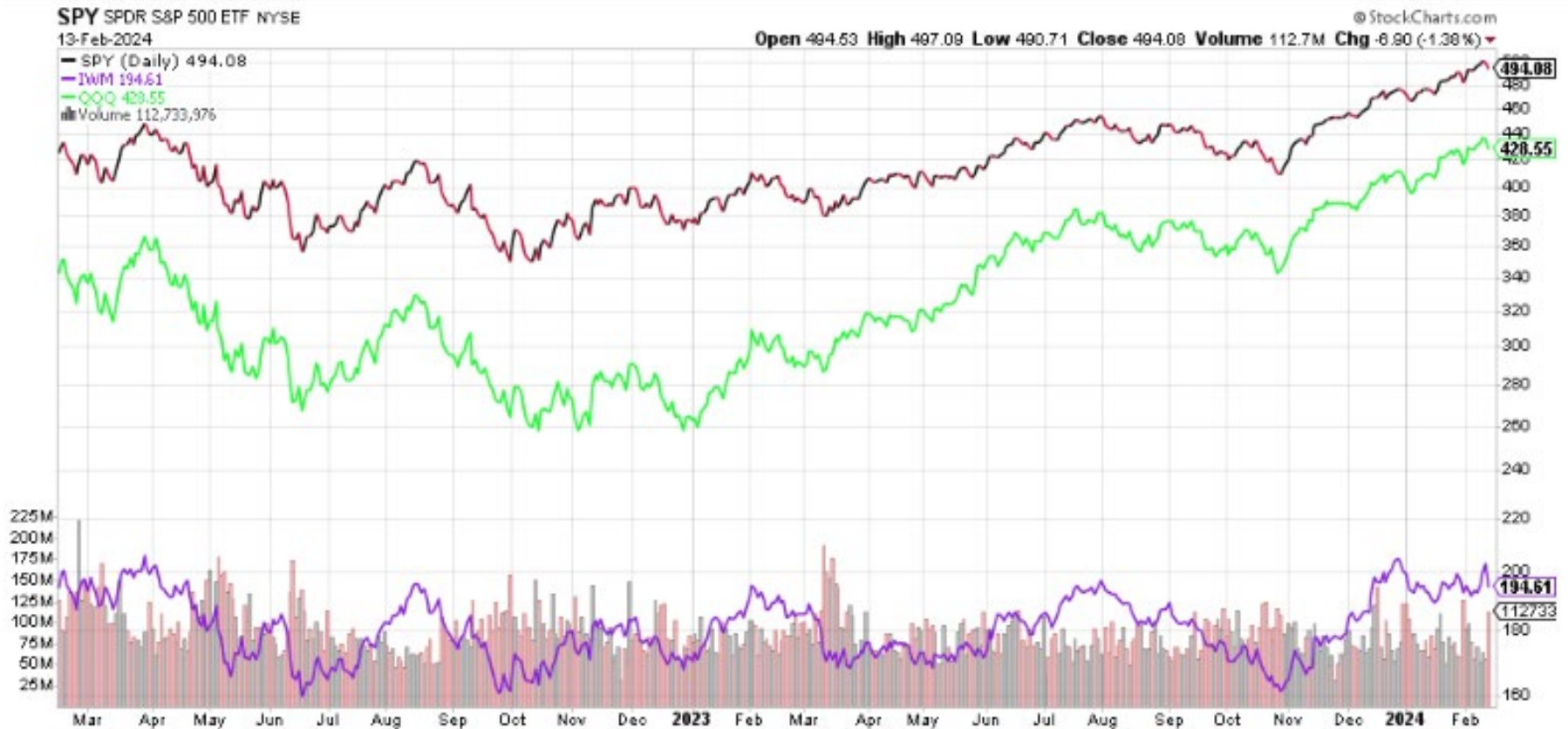
13-Feb-2024

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Open -2164.00 High -2164.00 Low -2164.00 Close -2164.00 Chg -2391.00 (-1053.30%)



Market Breadth – another way



This is NOT investment advice

Weekly market direction

Prof. Guy Werner

Guy.werner@verizon.net

		ANIL PARIKH'S TRIPLE SCREEN (52 W DAILY HIGH SHOWN IN GREEN 52 W LOW SHOWN IN RED)														
		DISTRIBUTION DAYS		S&P 500 TRIPLE SCREEN							NASDAQ TRIPLE SCREEN					
	DATE	MARKET PULSE (IBD)	S&P 500	NASDAQ	B-20 EMA	MACD	RSI	CLOSING	Δ	%CHANGE	B-20 EMA	MACD	RSI	CLOSING	Δ	%CHANGE
SAT	01/27/24	FOR THE WEEK							51	1.04%					145	0.94%
SUN	01/28/24	YTD							121	2.54%					444	2.96%
MON	01/29/24	CONFIRMED UP (60% -80%)	6	1	P	P	P	4,927	37	0.76%	P	P	P	15,628	173	1.12%
TUE	01/30/24	CONFIRMED UP (60% -80%)	6	1	P	P	P	4,924	-3	-0.06%	P	P	P	15,509	-119	-0.76%
WED	01/31/24	CONFIRMED UP (60% -80%)	7	2	P	P	P	4,845	-79	-1.60%	P	0	P	15,164	-345	-2.22%
THUR	02/01/24	CONFIRMED UP (60% -80%)	7	2	P	P	P	4,906	61	1.26%	P	P	P	15,361	197	1.30%
FRI	02/02/24	CONFIRMED UP (80% -100%)	6	2	P	P	P	4,958	52	1.06%	P	P	P	15,628	267	1.74%
SAT	02/03/24	FOR THE WEEK							68	1.39%					173	1.12%
SUN	02/04/24	FOR THE MONTH							113	2.33%					464	3.06%
SUN	02/04/24	YTD							189	3.96%					617	4.11%
MON	02/05/24	CONFIRMED UP (80% -100%)	7	3	P	P	P	4,942	-16	-0.32%	P	P	P	15,597	-31	-0.20%
TUE	02/06/24	CONFIRMED UP (80% -100%)	6	2	P	P	P	4,954	12	0.24%	P	P	P	15,609	12	0.08%
WED	02/07/24	CONFIRMED UP (80% -100%)	5	2	P	P	P	4,995	41	0.83%	P	P	P	15,756	147	0.94%
THUR	02/08/24	CONFIRMED UP (80% -100%)	5	2	P	P	P	4,997	2	0.04%	P	P	P	15,793	37	0.23%
FRI	02/09/24	CONFIRMED UP (80% -100%)	3	1	P	P	P	5,026	29	0.58%	P	P	P	15,990	197	1.25%
SAT	02/10/24	FOR THE WEEK							68	1.37%					362	2.32%
SUN	02/11/24	YTD							257	5.39%					979	6.52%

https://drive.google.com/drive/folders/0B6Qc_gipshXMelkzQ245d2R1eTQ?resourcekey=0-5pWglNqaJPJ12L2qYurMWg

TLT iShares 20+ Year Treasury Bond ETF Nasdaq GM

13-Feb-2024

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TLT (Daily) 92.35

Volume 49,718,140

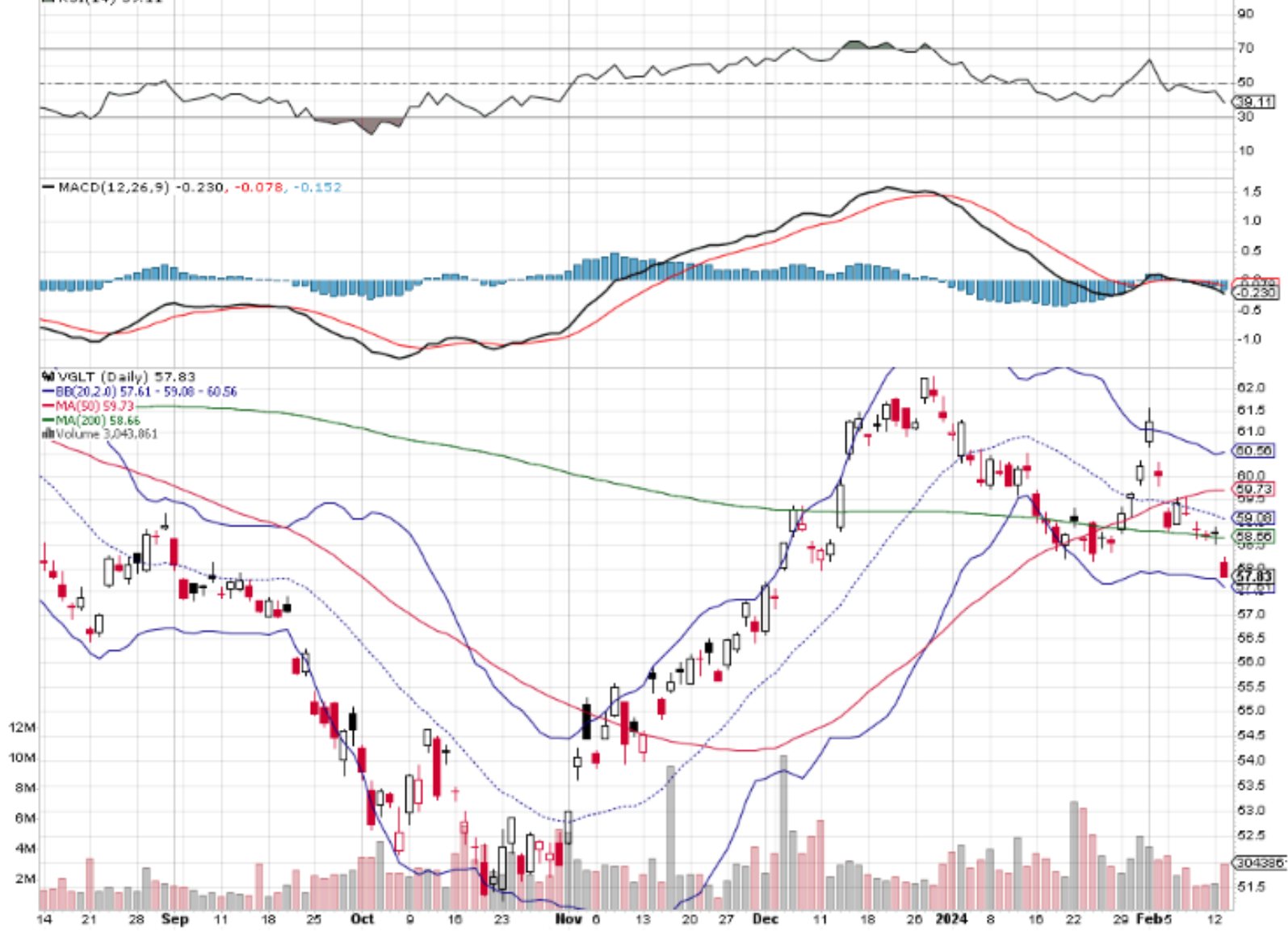
Open 92.86 High 93.06 Low 92.33 Close 92.35 Volume 49.7M Chg -1.61 (-1.71%)



RSI(14) 39.11

MACD(12,26,9) -0.230, -0.078, -0.152

VGLT (Daily) 57.83
BB(20,2.0) 57.61 - 59.08 - 60.56
MA(50) 59.73
MA(200) 58.66
Volume 3,043,861



\$USD US Dollar - Cash Settle FOREX

14 Feb-2024 1:21am

📈 \$USD (Weekly) 104.87

— MA(40) 103.49

📊 Volume undef

Open 103.97 High 104.90 Low 103.36 Last 104.87 Chg +0.88 (+0.85%) ▲

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A rise in the dollar
negative for Big tech
Positive for commodities

Third Class – Feb. 21th

- Class Introduction
- Market update
- Deep Dive into the markets
 - JP Morgan monthly market review

Thanks !!

□ Happy Investing !!

□ **My EMail**

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□ **Class website**

□ <http://udel.edu/~diyinvst>