

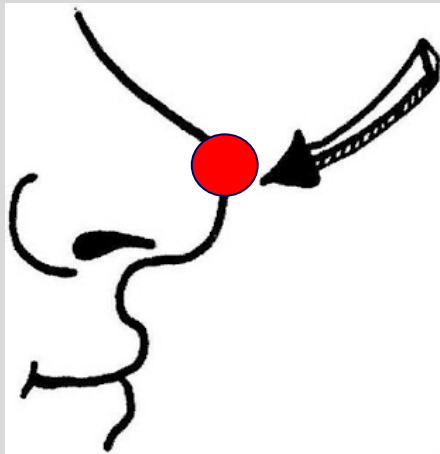
Investing for Successful Retirement

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.

Seventh Class – March 20th

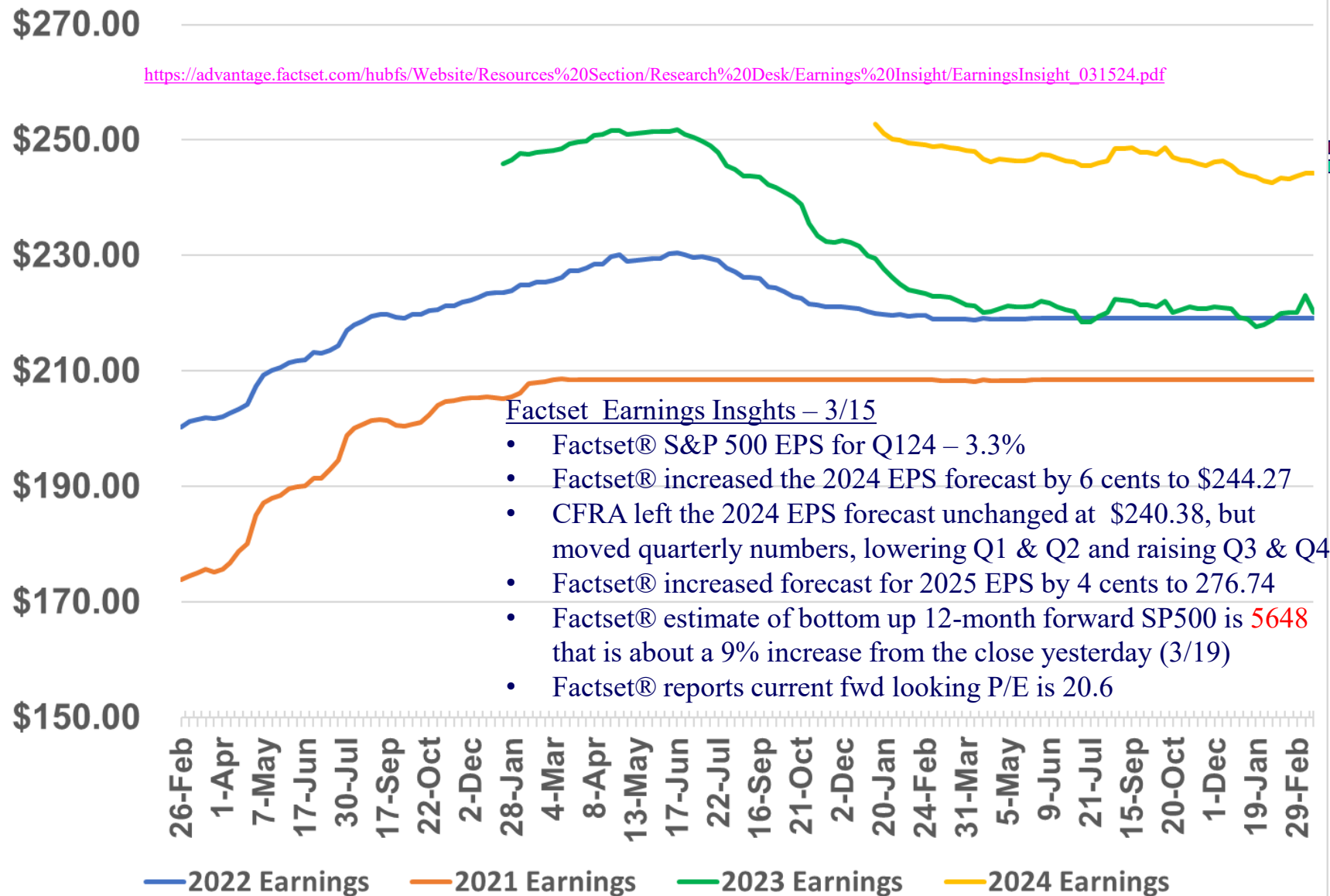
□ External speaker

- Prof. Rich Jakotowicz, Univ. of Delaware – CFA, CFP
 - Financial Planning and Wealth Management major in the Lerner School
 - Bloomberg trading center at UD
 - Leader / Mentor – Blue Hen Investment Club
 - Director of Financial Planning at Benchmark Financial
- Investing in the current environment
- 9am to 9.55am

□ US Equities Market Review – 20 minutes

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

https://advantage.factset.com/hubfs/Website/Resources%20Section/Research%20Desk/Earnings%20Insight/EarningsInsight_031524.pdf



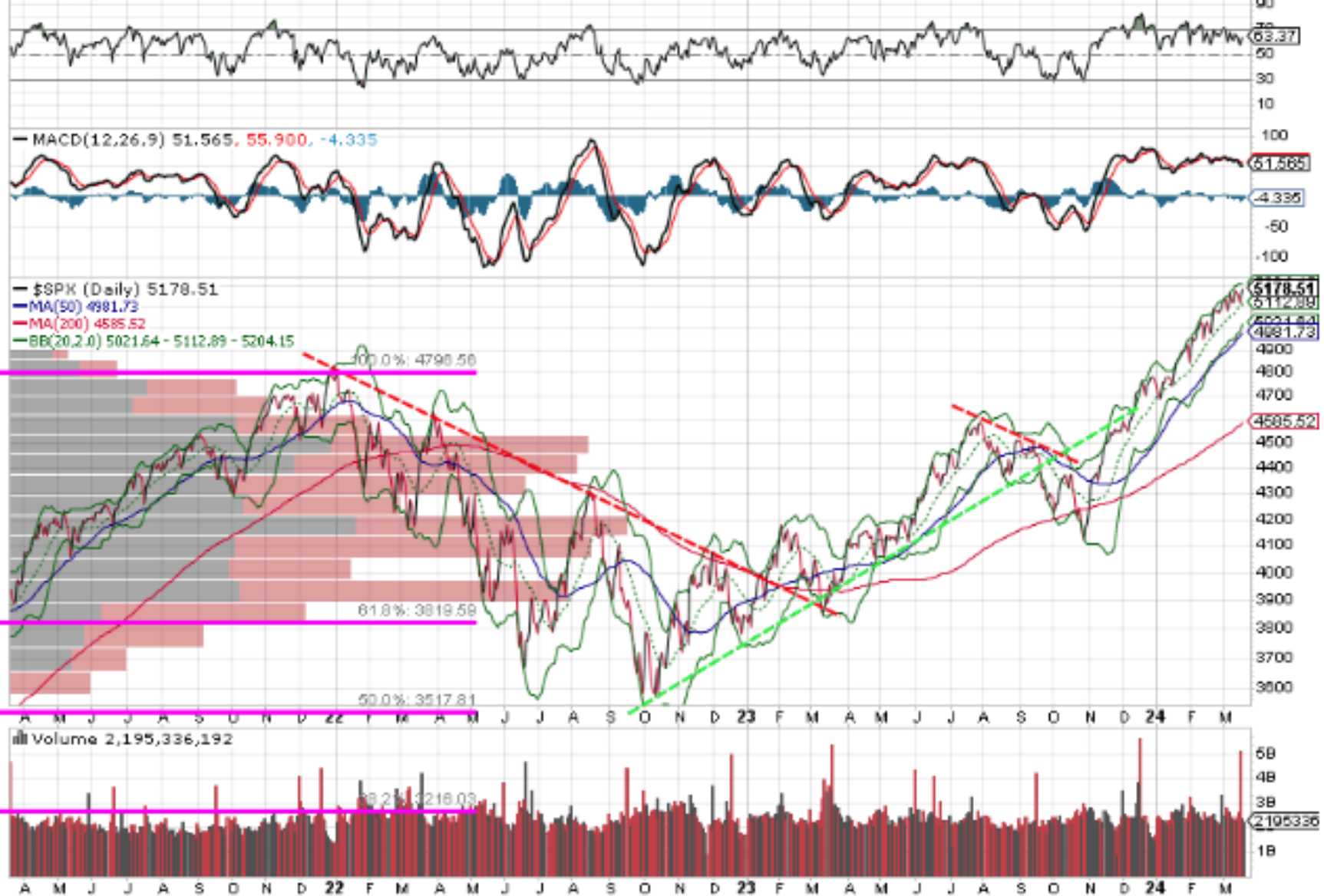
\$SPX S&P 500 Large Cap Index: INDX

© StockCharts.com

19-Mar-2024

Open 5139.09 High 5180.31 Low 5131.59 Close 5178.51 Volume 2.2B Chg +29.09 (+0.56%) ▲

▲ RSI(14) 63.37



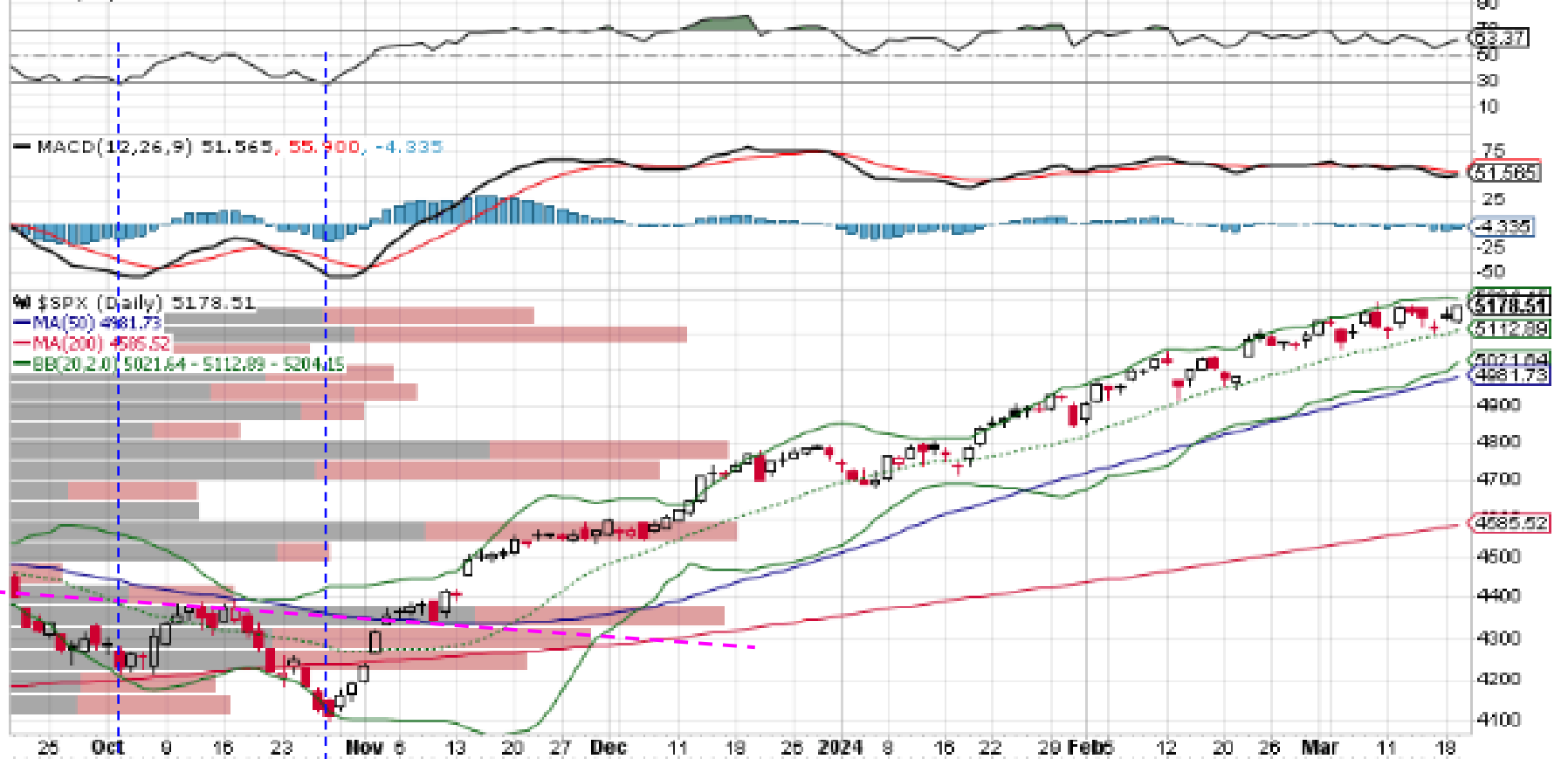
\$SPX S&P 500 Large Cap Index INDX

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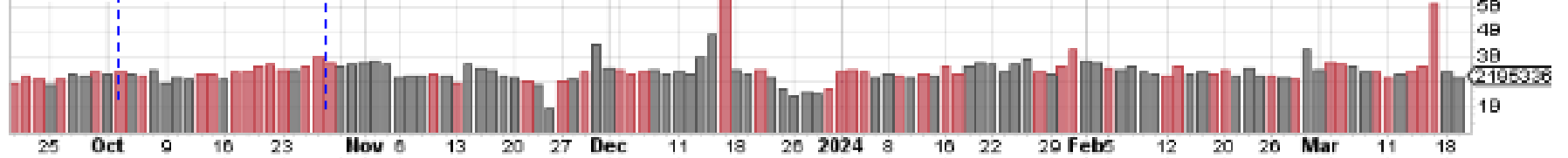
19-Mar-2024

Open 5139.09 High 5180.31 Low 5131.59 Close 5178.51 Volume 2.2B Chg +29.09 (+0.56%) ▲

▲ RSI(14) 63.37



Volume 2,195,336,192



\$NYAD NYSE - Advance-Decline Issues INDX

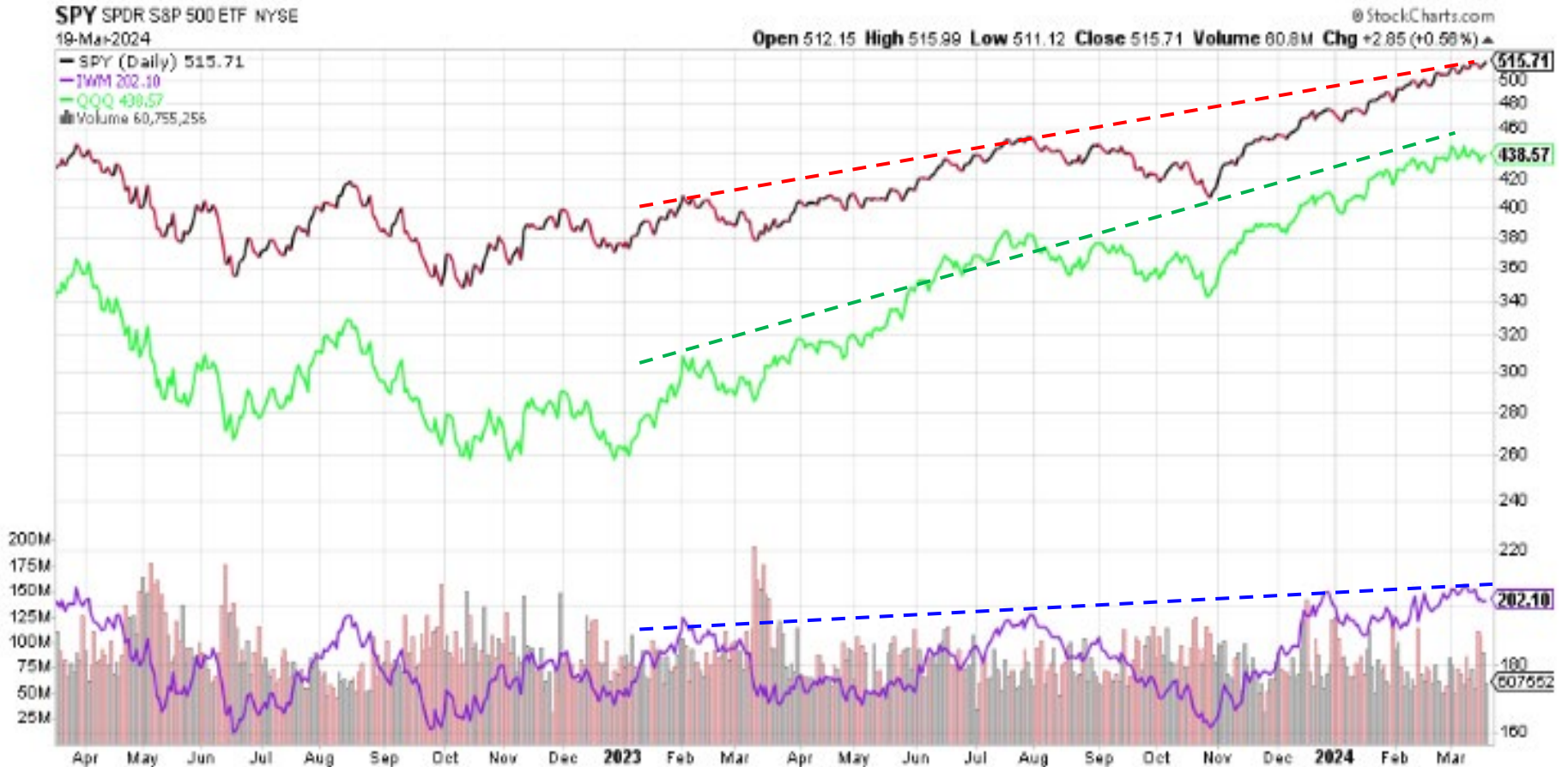
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19-Mar-2024

Open 6839.00 High 6839.00 Low 6839.00 Close 6839.00 Chg +1083.00 (+18.82%) ▲



Market Breadth – another way



This is NOT investment advice

Weekly market direction

Prof. Guy Werner

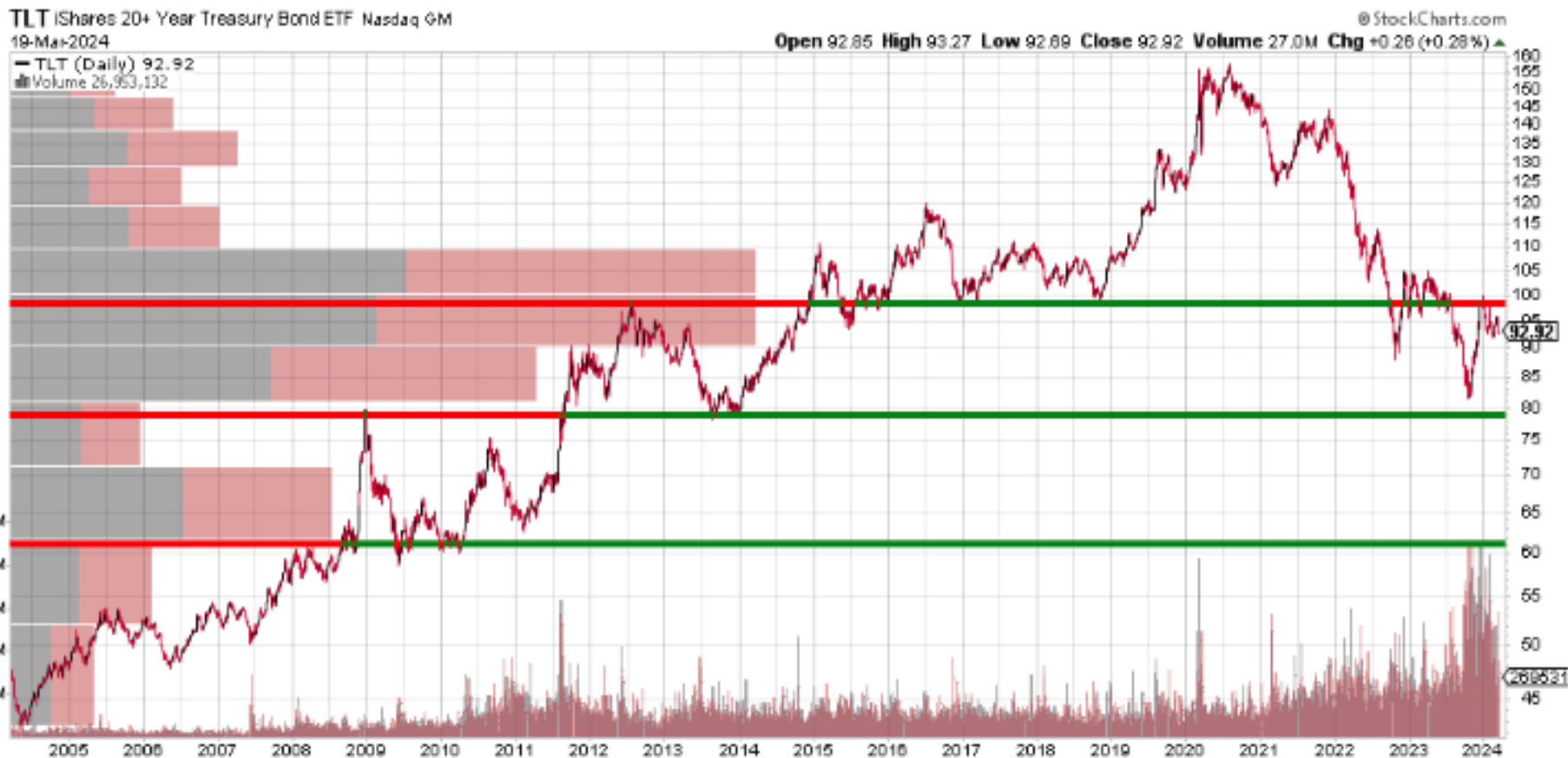
Guy.werner@verizon.net

COLUMNS CD&E ARE FROM IBD AND ARE PROVIDED BY DAVE (IN THE NORTH) SMITH

		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						
SAT	DATE	MARKET PULSE (IBD)	S&P 500	NASDAQ	52 W EMA	MACD	RSI	CLOSING	Δ	%CHANGE	52 W EMA	MACD	RSI	CLOSING	Δ	%CHANGE
		FOR THE WEEK							49	0.96%					278	1.74%
SUN	03/03/24	YTD							368	7.72%					1263	8.41%
SUN	03/03/24	FOR THE MONTH							251	5.18%					927	6.11%
MON	03/04/24	CONFIRMED UP (60% -80%)	4	5	P	P	P	5,130	-7	-0.14%	P	P	P	16,207	-87	-0.41%
TUE	03/05/24	CONFIRMED UP (60% -80%)	4	6	P	0	P	5,078	-52	-1.01%	P	0	P	15,939	-268	-1.65%
WED	03/06/24	CONFIRMED UP (60% -80%)	4	6	P	F	P	5,104	26	0.51%	P	F	P	16,031	92	0.58%
THUR	03/07/24	CONFIRMED UP (60% -80%)	4	6	P	0	P	5,157	53	1.04%	P	0	P	16,273	242	1.51%
FRI	03/08/24	CONFIRMED UP (60% -80%)	5	4	P	0	P	5,123	-34	-0.66%	P	F	P	16,085	-188	-1.16%
SAT	03/09/24	FOR THE WEEK							-14	-0.27%					-189	-1.16%
SUN	03/10/24	YTD							354	7.42%					1074	7.15%
MON	03/11/24	CONFIRMED UP (60% -80%)	5	4	P	F	P	5,117	-6	-0.12%	P	F	P	16,019	-66	-0.41%
TUE	03/12/24	CONFIRMED UP (60% -80%)	4	4	P	0	P	5,175	58	1.13%	P	F	P	16,265	246	1.54%
WED	03/13/24	CONFIRMED UP (60% -80%)	4	4	P	0	P	5,165	-10	-0.19%	P	F	P	16,177	-88	-0.54%
THUR	03/14/24	CONFIRMED UP (60% -80%)	5	5	P	F	P	5,150	-15	-0.29%	P	F	P	16,128	-49	-0.30%
FRI	03/16/24	CONFIRMED UP (60% -80%)	6	6	P	F	P	5,117	-33	-0.64%	P	F	P	15,973	-155	-0.96%
SAT	03/17/24	FOR THE WEEK							-6	-0.12%					-112	-0.70%
SUN	03/18/24	YTD							348	7.30%					962	6.41%
MON	03/19/24	CONFIRMED UP (60% -80%)	6	6	P	F	P	5,149	32	0.63%	P	F	P	16,103	130	0.81%
TUE	03/20/24	CONFIRMED UP (60% -80%)	6	6	P	F	P	5,178	29	0.56%	P	F	P	16,166	63	0.39%

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

US Treasuries - long duration



US Dollar - weekly



Eighth Class – April 3rd

- No class next week – Spring break
- US Equities Market Review – 20 minutes
- You only make money when you sell

Thanks !!

- Happy Investing !!

- **My EMail**

 - diyinvst@udel.edu

- **Class website**

 - <http://udel.edu/~diyinvst>