



Portfolio Trade Alert - December 10, 2021

Trade Alert For Both Equity & ETF Models

As noted previously, we will continue to use weakness in the market to add additional exposure to the portfolio in preparation for the year-end rally. Today, we are adding 3% of the portfolio into the equity allocation sleeve.

With the exception of the addition of 1% to our SPY trading position, we are adding to our existing core holdings in both models after recent corrective action. We do expect we could see some additional market weakness next week heading into December options expiration. We will continue using dips to add exposure accordingly.

Equity Model

- *Increase Netflix (NFLX) by 0.5% of the total portfolio. Model weight is now 2.5%*
- *Add 0.5% to Adobe (ADBE) bringing total portfolio weight to 2.5%.*
- *Ford (F) gets increased by 0.5% to a total weight of 3%.*
- *Costco (COST) also gets increased by 0.5% to a total weight of 3%.*
- *Add 1% to the SPY trading position bringing total weight to 5%.*

ETF Model

- *Add 1% to LIT (Lithium ETF) bringing portfolio weight back to 3%.*
- *Increase XLK (Technology ETF) by 1% bringing total portfolio weight to 13.5%*
- *Add 1% to the SPY trading position bringing total weight to 5%.*

[dmc]

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