



Portfolio Trade Alert - April 10, 2026

Trade Alert - Equity & ETF Models

We are shifting our exposure within the software sector. We are shifting out of Palo Alto Networks (PANW) and adding to Palantir (PLTR). Both stocks, like CRM and NOW, have been under pressure due to the AI narrative. We think PLTR is better positioned to benefit from AI, while PANW risks meaningful competition from AI. Moreover, PLTR has developed deep ties with the military, which will bolster its earnings. No reciprocal trade is needed in the sector model.

Equity Model

- *Sell 100% of PANW*
- *Add PLTR to bring it to a 3% weight*

ETF Model

- *No Trades*

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