



Portfolio Trade Alert - April 11, 2025

Trade Alert - Equity & ETF Models

With the bond market in turmoil and volatility running at elevated levels, we are reducing equity exposure today in both models by adding 2.5% of an S&P 500 Short Position (SH). This is a temporary risk reduction measure that will be removed once the bond market crisis passes. We will likely increase this position to 5% of the portfolio if the market musters a near-term rally to overhead resistance.

Equity Model

- *Add 2.5% of the S&P 500 Short ETF (SH)*

ETF Model

- *Add 2.5% of the S&P 500 Short ETF (SH)*
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