



Portfolio Trade Alert - April 14, 2025

Trade Alert - Equity & ETF Models

Oil has been extremely beaten up lately, with concerns over tariffs, slowing economic growth, and falling inflation. Likewise, energy stocks, which we sold over a month ago, have also been hit hard, with many trading three standard deviations below their means. We are picking up a trading position in energy stocks for a potential rally over the next few weeks. We will evaluate those positions regularly and rebalance them as needed. We are also running fairly tight stops in case the trade fails.

Equity Model

- *Add 1% of the portfolio each in Exxon Mobil (XOM) and Diamondback Energy (FANG)*

ETF Model

- *Add a 2% position in the iShares Energy ETF (XLE)*

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