



Portfolio Trade Alert - April 14, 2026

Trade Alert - Equity Model Only

With the market surging above all resistance levels, other than all-time highs, oil dropping, and yields falling, the correction is officially over. As such, we started adding exposure last week and are finishing it today.

The ETF model was already at target weight, so today's actions align both portfolios. We are adding to our existing holding of Raytheon Technologies, bringing it to 2% of the portfolio. We are also initiating three started positions in the portfolio at 1% each: Broadcom (AVGO), Vertiv Holdings (VRT), and Applied Digital (APLD) all of which give us exposure to the data center construction boom.

As always, with starter positions like these, we are hoping the market will give us a bit of a pullback so we can bring these holdings up to target weights.

Equity Model

- *Increase RTX to 2% of the portfolio.*
- *Initiate a 1% position in AVGO, VRT, and APLD.*

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