



Portfolio Trade Alert - April 6, 2026

Trade Alert - Equity & ETF Models

In both models, we are adding to our short-position to hedge portfolios near term. This is not a bet on an ongoing market crash, but as we pointed out previously, after the market breaks the 200-DMA, it is not uncommon to see a reflexive rally that fails and retests previous lows.

We have previously reduced equity risk, but most of our holdings are in companies we want to own long-term and are currently deeply oversold. As such, adding a broad-market hedge to further reduce risk is easy.

We now have a 5% position in SH. If the market recovers the 200-DMA and holds above it, and momentum turns positive, we will remove the hedge and start adding to our long-positions.

Equity Model

- *Add 2.5% of SH to the portfolio.*

ETF Model

- *Add 2.5% of SH to the portfolio.*

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