



## Portfolio Trade Alert - April 9, 2026

### Trade Alert - Equity & ETF Models

We are selling our two software companies and the software ETF that we added a few weeks ago. The initial purchases have not worked as expected, as the bearish AI narrative continues to weigh heavily on the sector despite significant losses. Yesterday, despite broad market gains, most software stocks were lower. We may revisit the sector if or when the tone improves.

#### Equity Model

- *Sell 100% of CRM*
- *Sell 100% of NOW*

#### ETF Model

- *Sell 100% of IGV*
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