Portfolio Trade Alert - August 17, 2026

Equity Model Only

After rebalanacing the portfolio last week, one trade we wanted to make but didn't was with Broadcom (AVGO.) While we like the company and the space it is in, we wanted more exposure to the AI chips being used in data center and AMD specializes in general-purpose GPUs and CPUs (like the Instinct MI300 series).

AI workload, especially newer agentic AI models, increasingly require powerful central processors to feed data to GPUs. AMD is a dominant CPU leader (EPYC), while Broadcom does not sell data center CPUs. Furthermore, Massive Memory Capacity is where AMD?s flagship accelerators offer high High Bandwidth Memory (HBM) capacities, making them very attractive for large language model inference and cost-effective scaling.

After the recent correction, the stock is turning up on a buy signal and technically looks more compelling that Broadcom currently. We are doing an even swap and taking the gains in the Broadcom position and swapping into AMD for now.

Equity Model Trades

- *Sell 100% of AVGO and buy 2% of the portfolio in AMD.*

ETF Model Trades

- *Sell XLE.*

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