



Portfolio Trade Alert - August 30th, 2024

Trade Alert - Equity, Dividend Growth, and ETF Model

This morning, we are adding a starting position in Mortgage REIT exposure to all models in anticipation of the Fed's coming rate cuts. Those rate cuts should lead to an eventual pickup in mortgage prepayment speeds, which benefit Mortgage REITs.

In the Equity Model, we are starting the position at 1% of Annaly Capital Management (NLY), and in the sector, we added 1% to the iShares Mortgage Real Estate ETF (REM.) In the Dividend Growth Model we are adding 2% of NLY to replace the previous sale of Phillip Morris (PM).

Equity Model

- *Buy 1% of the portfolio in NLY.*

ETF Model

- *Add 1% of the iShares Mortgage Real Estate ETF (REM).*

Dividend Growth Model

- *Buy 2% of the portfolio in Annaly Capital Management (NLY)*

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