



Portfolio Trade Alert - August 6, 2025

Trade Alert - Equity & ETF Models

We are doing minor portfolio rebalancing in the Equity and ETF models to balance portfolio risk. This is only minor maintenance and not a required trade. However, positions like PLTR and GEV have had massive runs recently, so we are just reducing those back to target portfolios. Conversely, we are adding to some of our more oversold positions to potentially gain from a market rotation if we enter into a more "risk-off" environment.

Refer to the [portfolios tab](#) for the target weights of each position.

Equity Model

- *Bring PG, OKE, PANW, KMI, and BRK-B to portfolio target weights.*
- *Reduce PLTR, GEV, GOOG, JPM, AMZN, NVDA, and NLY to target weights.*

ETF Model

- *Increase XLP, XLV, and XLF to target weights.*
- *Reduce XLK, XLC, XLU, and XLI to target weightings.*

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