



Portfolio Trade Alert - August 7, 2026

Trade Alert - Thematic Portfolio Rebalances

We are rebalancing three of the Thematic Models today:

Growth Focused Equity

Small and MidCap Equity

Crypto Currency Portfolio

These are primarily a rebalance of existing holdings, but we did make a few changes to the portfolios to recalibrate them with their goals.

For specific transactions, check the transaction tab of each portfolio model.

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