



Portfolio Trade Alert - December 1, 2023

Trade Alert - ETF Model Only

With the recent rally in the market, we are taking the opportunity to wrap up our tax loss selling for the ETF model. We are closing out the SPDR Bank ETF (KBE) and the iShares Medical Devices ETF (IHI). When the market provides an entry point, we will increase our holdings in the SPDR Financial Sector ETF (XLF) and add to the SPDR Select Sector Technology Fund (XLK) to align these two sectors with the S&P 500 benchmark weightings.

ETF Model Only

- *Sell 100% of both the SPDR Bank ETF (KBE) and the iShares Medical Devices ETF (IHI)*
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