



Portfolio Trade Alert - December 31, 2024

Trade Alert - Equity & ETF Model

To wrap up the year, we are taking a short-term tax loss sell in the Russell 2000 Index ETF (IWM) in both models. However, we are increasing Utilities exposure in both models by 1%. In the ETF Model, we are increasing the iShares Utilities ETF (XLU) to 4.5% of the portfolio. In the Equity Model, we are increasing Ge Vernova (GEV) by 1% to 2% of the portfolio. We expect increased demand in 2025 for power generation for data centers and artificial intelligence buildout.

Equity Model

- *Sell 100% of IWM*
- *Increase GEV to 2% of the portfolio.*

ETF Model

- *Sell 100% of IWM*
- *Increase XLU to 4.5% of the portfolio*

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