



Portfolio Trade Alert - February 13, 2026

Trade Alert - Equity & ETF Models

We rebalanced some of our overbought positions in the equity model back to model weights. Other than **GEV**, which is a growth stock, the trade included four value stocks (**WMT, VZ, KMI, and MO**). The value ? growth trade is getting long in the tooth. Thus, we are taking some profits. We are not yet ready to reduce value further and add growth, as the current portfolio balance has been working well. The sector model is in better balance, therefore we do not need to make similar trades today.

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Equity Model

- *Sell the following stocks to their model weights:*
- *GEV 2.50%*
- *WMT 2.00%*
- *VZ 2.00%*
- *KMI 3.00%*
- *MO 2.00%*

ETF Model

- *No trades*

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