



Portfolio Trade Alert - February 1st, 2024

Trade Alert - Dividend Equity Model

As we noted previously, we are using opportunities to build out the dividend equity model. Yesterday's sell-off provided another opportunity to add to some existing positions, and initiate a new one, in our process. We need to increase the weight of the Technology shares, but will wait until after today's earnings to look for a better entry point.

Dividend Equity Model

- *Initiating a position in Duke Energy (DUK)*
- *Adding to existing holdings as follows increasing each to 2.2% of the portfolio.*
 - *Philip Morris (PM)*
 - *Simon Property Group (SPG)*
 - *Federal Realty Trust (FRT)*
 - *Stanley Black and Decker (SWK)*
 - *Realty Income (O)*
 - *Legget and Platt (LEG)*
 - *Verizon (VZ)*
 - *Consolidate Edison (ED)*

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