



Portfolio Trade Alert - February 4, 2026

Trade Alert - Factor Rotation Model

The recent outperformance of value over growth has pushed the relationship to an overbought level. Therefore, it is likely that growth outperforms value in the near term. This relationship triggered a trading signal in our Factor Rotation Model; as a result, we are rebalancing the model to favor growth stocks over value.

For context, during the 15-year period we used to back-test the model, the average duration a trading signal persisted was 129 days. Meanwhile, the minimum and maximum durations for trading signals were 16 days and 453 days, respectively.

Factor Rotation Model

- *Shift to 80% growth and 20% value. Please see the transaction history in SimpleVisor for details.*

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