



## Portfolio Trade Alert - December 23, 2024

### Trade Alert - Dividend Equity Model Only

Given the deep oversold condition in the energy sector, we are selling one of our utility stocks and adding to energy. We are also swapping a 3%+ dividend yield for a 4.6% yield. We were overweight in the utilities sector with Edison (ED), so we are swapping ED for KinderMorgan (KMI), which should also benefit from the data center buildout and future power demand increases.

### Equity Model

- *Sell 100% of Edison (ED)*
  - *Initiate a 3.33% position in the portfolio with KinderMorgan (KMI)*
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