



Portfolio Trade Alert - February 26, 2025

Trade Alert - Equity Models

This morning, we are doing a tax loss harvest and swapping in the portfolio. We are selling all of AMD (AMD), which has been underperforming, and swapping it into Arista Networks (ANET). This swap provides two purposes to the portfolio. First, it diversifies the portfolio into hardware on the technology side, to which we had no exposure. Secondly, it reduces our exposure to semiconductors ahead of the Nvidia (NVDA) earnings report tonight.

If NVDA reports well, that report should benefit ANET, which is very oversold as well as AMD. However, a poor report would likely impair AMD more than ANET. While we still like AMD, overall, the swap reduces the portfolio risk.

Equity Model

- *Sell 100% of AMD*
- *Initiate a 1% of the portfolio position in Arista Networks (ANET)*

ETF Model

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