



## Portfolio Trade Alert - January 12, 2024

### Trade Alert - Equity Model Only

This morning, United Healthcare (UNH) reported stronger-than-expected earnings and revenue. Despite the good news, the stock opened lower by 5%. The decline is a function of rising costs. Despite rising expenses, their profit guidance is unchanged. This morning's sell-off allowed us to add to our position, as we have wanted to. We added 1% of UNH to the equity model.

### Equity Model

- *Add 1% of the Portfolio to United Healthcare (UNH)*

---

### Want These Alerts Via TEXT?

To receive trade information via text, click on your user name in the upper right corner of the website. **Then click My Account and the title SMS Notification Preferences.**

**NOTE: You must add your country code in front of your number.** The U.S. code is 1.

Please let us know if you have any problems.