



Portfolio Trade Alert - January 14, 2025

Trade Alert - Equity & ETF Model

On this morning's [RealInvestmentShow](#) we discussed the need to be somewhat more "*tactically bearish*" as we head into 2025. As such, this morning, we made a few changes to both portfolios to slightly reduce our equity exposure via rebalancing a few positions to model or reducing their model weights.

In aggregate, including all the trades, we reduced our net exposure in both models. We have wanted to buy Palantir (PLTR) for a while but have been patiently waiting on a correction. It is down almost 20% from highs, giving us a chance to add a starter position. We may add to PLTR if the correction isn't over. Below are the following changes and the new model weights:

Equity Model

- *Add to AMD to rebalance up to model weight 2%*
- *Initiate a starter position in PLTR of 1% of the portfolio.*
- *Reduce NVDA and GOOG by 0.5% to 2% and 3.5% of the portfolio respectively.*
- *Take profits in FANG and reduce the position by 0.5% to 1.5% weight.*
- *Trim JPM by 0.25% to 1.75% of the portfolio.*

ETF Model

- *Rebalance XLC to the target model weight of 7%.*
- *Take profits in XLE and reduce exposure by 0.5% to 3.5% of the portfolio.*
- *Reduce XLF to 4% of the portfolio.*

The net equity reduction in the SimpleVisor accounts is 1.3% equity and 1.9% sector.

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