



Portfolio Trade Alert - January 23, 2024

Trade Alert - NEW MODEL - Dividend Equity-Focused Portfolio

Today, we are launching a new portfolio: a 100% equity portfolio split 70% on dividend stocks and 30% on S&P 500 growth stocks. We are buying 1/3 of the positions today, and over the next couple of weeks, we will dollar-cost average into the remaining 2/3rds. The goal is a long-term holding period with lower volatility and a higher yield than the S&P 500.

Dividend Equity-Focused Model

Action	Ticker	Est Amount	Order Qty	Price	Messages
BUY	PM	\$1,109.16	12.0000	\$91.11	
BUY	FAST	\$1,118.56	16.0000	\$69.59	
BUY	KO	\$1,131.83	19.0000	\$59.66	
BUY	GS	\$1,157.88	3.0000	\$382.24	
BUY	CVS	\$1,108.95	15.0000	\$74.40	
BUY	SWK	\$1,153.44	12.0000	\$96.00	
BUY	MDT	\$1,124.11	13.0000	\$87.03	
BUY	ED	\$1,159.60	13.0000	\$89.21	
BUY	XOM	\$1,161.84	12.0000	\$97.36	
BUY	KMB	\$1,101.06	9.0000	\$124.81	
BUY	SPG	\$1,136.16	8.0000	\$143.35	
BUY	O	\$1,167.18	21.0000	\$55.93	
BUY	MMM	\$1,080.20	10.0000	\$97.91	
BUY	AAPL	\$1,551.12	8.0000	\$194.94	
BUY	TFC	\$1,147.31	31.0000	\$37.06	
BUY	VZ	\$1,147.82	29.0000	\$41.33	
BUY	AML	\$1,170.72	27.0000	\$43.35	
BUY	JPM	\$1,020.66	6.0000	\$169.12	
BUY	LEG	\$1,173.51	51.0000	\$23.12	
BUY	FRT	\$1,108.80	11.0000	\$101.44	
BUY	ABBV	\$1,157.73	7.0000	\$166.08	
BUY	META	\$1,527.12	4.0000	\$384.15	
BUY	AMZN	\$1,547.80	10.0000	\$154.34	
BUY	GOOG	\$1,624.81	11.0000	\$148.47	
BUY	NVDA	\$1,789.62	3.0000	\$592.18	
BUY	MSFT	\$1,586.04	4.0000	\$395.05	

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