Portfolio Trade Alert - January 27, 2026

Trade Alert - Equity Models

We are making some room in the Equity model today to add 2.5% of the portfolio to Apple (AAPL) ahead of earnings. Apple has had a decent correction and is oversold enough on a technical basis to foster a bounce post earnings, even if the earnings aren't stellar. Given that we are already overexposed to equities in the model, we need to make some room for the addition. Therefore, we are reducing our positions in Palantir (PLTR) to 2.5%, PaloAlto Networks (PANW) to 2%, and JP Morgan (JPM) to 2% of the portfolio.

Equity Model

- *Reduce PANW and JPM to 2.0% of the portfolio, respectively.*
- *Reduce PANW to 2.5% of the portfolio.*
- *Initiate a position in AAPL at 2.5% of the portfolio.*

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