



Portfolio Trade Alert - January 5, 2024

Trade Alert - Equity & ETF Models

As we closed out last year, we took advantage of tax loss selling to reduce some positions in the portfolio. We entered the New Year a bit underweight in equity exposure, particularly in Healthcare. This morning, we are adding starter positions in both United Healthcare ([see today's UNH writeup](#)) and Ely Lilly. We are looking for some consolidation or correction in these two names to bring the positions to target weight.

To make room for these two holdings, as we want to remain overweight cash at the moment, we are selling Cisco Systems (CSCO), which has remained a laggard in the portfolio.

In the sector model, we are balancing the Healthcare allocation by adding 2% to the SPDR Healthcare ETF (XLV).

Equity Model

- *Initiate a 1.5% portfolio position in United Healthcare (UNH) and Ely Lilly (LLY)*
- *Sell 100% of Cisco Systems (CSCO)*

ETF Model

- *Add 2% to the SPDR Healthcare Sector ETF (XLV).*

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