



Portfolio Trade Alert - July 12, 2023

Trade Alert - Equity And ETF Models

With inflation falling to 3% this morning, the pressure on the Fed to hike rates is lessening. The disinflation trade is alive and well, with the markets breaking above the recent double top. With that breakout, we added some additional exposure as we continue to head to full portfolio weightings. We continue to take a slow and methodical approach to increasing equity risk in this market.

We remain underweight in the technology, discretionary, and communications sectors and are adding some additional exposure to those holdings. After the Nasdaq rebalancing on the 24th of July, we will likely add additional weightings then.

Equity Model

- *Increase Google (GOOG) by 1.25% of the portfolio.*
- *Adding 1% to Amazon (AMZN)*
- *Increasing Apple (AAPL) by 1% of the portfolio.*

ETF Model

- *Increasing the iShares Technology Sector ETF (XLK) by 2% of the portfolio.*
 - *Adding 1% of the portfolio to the iShares Discretionary Sector ETF (XLY)*
 - *Increasing the iShares Communications Sector ETF (XLC) by 1% of the portfolio.*
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