Portfolio Trade Alert - July 18, 2024

Trade Alert - Equity & ETF Model

We are continuing our process of derisking portfolios by rebalancing positions back to their target weights. This process reduces current position sizes and raises cash, which will help alleviate portfolio deterioration during a market correction.

In the Equity Model, we are reducing the weight of the following positions.

Amazon (AMZN), Ely Lilly (LLY), Google (GOOG), Apple (AAPL), Diamond Back Energy (FANG), Palo Alto Networks (PANW), Walmart (WMT), and United Technologies (RTX)

In the ETF Model, we are reducing the weight of the Technology sector ETF (XLK) and the Financial sector ETF (XLF).

Equity Model

- *Reduce to target portfolio weights - AMZN, LLY*, *GOOG, AAPL, FANG, PANW, WMT and RTX*

ETF Model

- *Reduce to target portfolio weights - XLF and XLK*

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