



## Portfolio Trade Alert - July 3, 2023

### Trade Alert - Equity Model Only

With the year's first half ending strongly, we have been slowly increasing our equity exposure. We wanted to get through Friday's quarter-end rebalancing, which went smoothly, with the markets ending positively. We have been watching Public Storage (PSA) and Advanced Micro Devices (AMD) for a reasonable technical entry point to add to those positions. The recent technical improvement in both positions gave us that opportunity.

### Equity Model

- ***Add 1% of the portfolio to Public Storage (PSA)***
  - ***Increase Advanced Micro Devices (AMD) by 1% of the portfolio.***
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