



Portfolio Trade Alert - July 30th, 2024

Trade Alert - Equity & Dividend Growth Model

In the Equity Model, we are taking some profits in Stanley Black & Decker (SWK), which is up 7% today and about 25% over the past month. We are reducing SWK from 3.75% to 3.25%. We are also adding to Advanced Micro Devices (AMD) after having reduced it two weeks ago. Since cutting our exposure, the stock has declined by over 20%. It is now very oversold by many measures. We are adding a small .25% after cutting by .50-.75%. Despite being very oversold, we are apprehensive about adding more due to their earnings report tonight.

In the Dividend Growth Model, we are reducing both SWK and 3M (MMM), which has also increased by over 20% in the last two weeks and 40% since we added the position in January. These moves are relatively extreme, so we will wait for a pullback to increase the position size to target weights.

Equity Model

- *Reduce SWK To 3% of the portfolio.*
- *Increase AMD to 2% of the portfolio.*

Dividend Growth Model

- *Reduce SWK and MMM to 2.5% of the portfolio.*

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