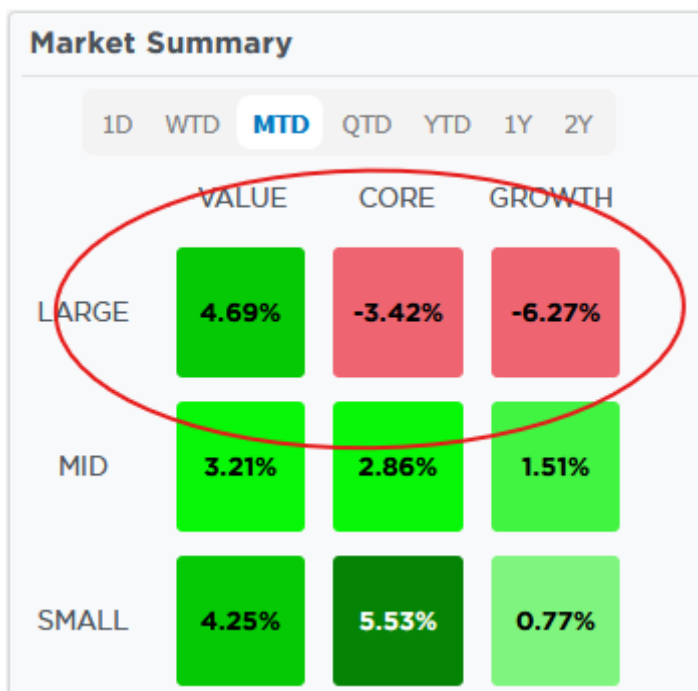


Portfolio Trade Alert - June 25, 2026

Trade Alert - Sector and Factor Rotation Model

Our factor rotation model shifted from an 80/20 value/growth stance to an 80/20 growth/value stance, reflecting the recent outperformance of value over growth as we share below. In addition to rebalancing all stocks in the factor rotation model to reflect the growth tilt, we are taking similar actions in the sector model, reducing our 8% allocation to value (VTV) to 2% and increasing our growth exposure (MGK) from 2% to 8%.



Sector Model

- Sell VTV to 2%
- Buy MGK to 8%

Factor Rotation

- Please see the transactions and new model weights in SimpleVisor Portfolios

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