



Portfolio Trade Alert - March 15, 2022

Trade Alert For Equity & Equity Models Only

With prices down in our long-term core portfolio holdings, along with the deeply depressed sentiment and investor allocations, we are using some of the stored cash to rebalance those positions back to market weight. As noted previously, we are looking for a short-term counter-trend reflexive rally, that we will again rebalance portfolio risks into. However, adding to our core positions, and bringing holdings back to weight, allows us the opportunity to take advantage of depressed prices.

Equity Model

- *Increasing Ford (F) from 2% to 3% of the portfolio.*
- *Adding 0.5% to AMD (AMD) and Nvidia (NVDA)*
- *Rebalancing Microsoft (MSFT) and Apple (AAPL) to model weights of 3% each.*

ETF Model

- *Increasing SPDR Technology ETF (XLK) by 2% of the portfolio.*