



## Portfolio Trade Alert - March 23, 2026

### Trade Alert - Equity & ETF Models

This morning, the President announced that talks with Iran have progressed nicely over the weekend, and he is postponing the strikes on Iranian facilities for now. That news sent risk assets higher immediately following Friday's sell-off. However, there are many *"trapped longs"* sitting above recent broken support levels, so we are going to use the rally to raise some cash and rebalance risk.

We are going to take a tax loss sell in META (META). While we like the company fundamentally, we will use the loss to offset gains we will take later in the year. In 30-days we can buy the position back if we choose. We are also trimming KMI after a nice run on higher oil prices. In the ETF model, we are selling the Global X Super Dividend ETF (DIV), trimming our position in the MLP ETF (AMLP), and reducing our position in the Megacap Growth ETF (MGK) by 1%.

This is a temporary reduction of equity risk, and if the market begins to heal up technically, we will begin re-adding long positions to portfolios as needed.

### Equity Model

- *Sell 100% of Meta (META) - Tax Loss Sell*
- *Reduce Kinder-Morgan Energy by 1% of the portfolio.*

### ETF Model

- *Sell 100% of the Global X Dividend ETF (DIV)*
- *Reduce AMLP and MGK by 1% of the portfolio each.*

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