



Portfolio Trade Alert - March 24, 2025

Trade Alert - Equity & ETF Models

This morning, we added to the financial sector via J.P. Morgan (JPM) and the iShares Financial Sector ETF (XLF.) We have been running below-market exposure in the sector and are using the positive technical outlook, along with increasing signs the market will bounce, to bring them up to speed.

Equity Model

- *Increase JPM to target portfolio weight of 3%*

ETF Model

- *Increase XLF to target portfolio weight of 5%*

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