



Portfolio Trade Alert - March 26, 2026

Trade Alert - Energy Model

We rebalanced our holdings in the Energy Model to model weights. The primary purpose of this action is to take gains in many of the stocks in the model that have been trading well, while adding to underperformers. Some sort of resolution to the Iranian oil supply problems will likely cause outperforming energy stocks to underperform and vice versa.

To view the transactions, click the Energy Model portfolio, then the Transactions tab.

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