



Portfolio Trade Alert - March 4, 2025

Trade Alert - Equity & ETF Models

We are starting to rebalance the Equity and ETF portfolios today. Over the next few days to weeks, we will continue rebalancing positions in the models closer to their target weights. Over the last several weeks, there has been a significant rotation into value out of growth. With positioning in both factors now off-side, a reversal of performance is becoming significantly more likely. As is always the case, we are starting slow and will opportunistically continue to rebalance as needed.

Equity Model

- *Reducing Eli Lilly (LLY) and Abbvie (ABBV) to portfolio target weights of 3.5% and 5%, respectively.*
- *Increase Microsoft (MSFT) and Google (GOOG) to portfolio target weights of 3.5% and 4%, respectively.*

ETF Model

- *Sell 100% of the Semiconductor ETF (SMH)*
- *Increase the Megacap Growth ETF (MGK) to 3% of the portfolio.*
- *Reduce the Staples ETF (XLP) to 7% of the portfolio*

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