



Portfolio Trade Alert - March 5, 2025

Trade Alert - Equity & ETF Models

As noted yesterday, given the recent market decline, we continue to tax loss harvest and rebalance portfolios. Oil has declined markedly, which is reducing inflationary pressures. Still, given the Trump Administration's plans to "drill baby drill," such suggests oil prices could decline further from an increase in supply. Therefore, we are selling the remaining positions in ExxonMobil (XOM) and DiamondBack Energy (FANG) to harvest the loss for tax purposes. We will rebuy these positions opportunistically in the future.

In the ETF Model, we are selling all of the iShares Energy ETF (XLE).

We are adding to Palantir (PLTR) to increase the position to target weight after the recent pullback, along with Nvidia (NVDA). Both positions are trading substantially cheaper than they were and are decently oversold, reducing our entry risk.

Equity Model

- *Sell 100% of Exxon Mobil (XOM) and DiamondBack Energy (FANG)*
- *Increase Palantir (PLTR) and Nvidia (NVDA) to their target weights of 2% each.*

ETF Model

- *Sell 100% of iShares Energy ETF (XLE)*

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