RIA Advice

Portfolio Trade Alert - May 16, 2025

Trade Alert - Equity & ETF Models

In early April, we reduced our exposure to healthcare stocks as the threat of tariffs loomed large. With that threat largely mitigated, and the recent executive order on drug pricing being more "bark than bite," we are starting to rebuild our positions at better prices. Today, we are increasing our current exposure in AbbVie (ABBV) and Eli Lilly (LLY) in the equity model, and adding to the iShares Healthcare Sector (XLV) in the ETF model.

Equity Model

- *Increase ABBV to 3.5% of the portfolio and LLY to 2.5%.*

ETF Model

- *Increase XLV to 7% of the portfolio.*

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