



Portfolio Trade Alert - May 28, 2024

Trade Alert - Equity Model

On Thursday, Costco (COST) will announce earnings. The stock has had a huge run and is pushing 2-standard deviations overbought. It is 4% in our model but over 4.5% in the portfolio. We are reducing the position back to the target model weight today. Even good earnings may not be enough to push the stock markedly higher from current levels. We will add back to the position when the stock corrects in price.

Equity Model

- *Reduce Costco (COST) back to target portfolio weight of 4%.*
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