



Portfolio Trade Alert - May 6, 2026

Trade Alert - Equity Model Only

Today, we are just doing some rather simplistic "pruning" in the portfolio by tactically rebalancing some holdings.

Overall, we slightly trimmed our market exposure as the market continues to race to new highs. Simultaneously, money flows are diverging, signaling a potential consolidation or reversal. We are not overly concerned about a large decline, but the market is very overbought and heading into a seasonally weak period. 2013266080;

Equity Model

- We are reducing JPM (2% of the Portfolio), AAPL (2.5%), AMZN (4.25%), and GOOG (4.5%) to target weights.
- We are adding slightly to RTX (2.5%) and LLY (4%).

ETF Model

- *None*

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