



Portfolio Trade Alert - November 13, 2023

Trade Alert - Equity Model

We are continuing our portfolio tax loss selling this morning with the remainder of Public Storage (PSA). Longer-term we like this company and will look to buy it back at some point after our 30-day tax loss selling period. This stock, in particular, should perform well in a lower interest rate environment next year, so we are looking for time to work on our side to provide a better entry point in 2024.

Equity Model

- *Sell 100% of Public Storage (PSA)*
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