



Portfolio Trade Alert - November 14, 2023

Trade Alert - Equity Model

This morning, we added 1.5% BRK-B to the equity model. We did nothing in the sector model as it has about 5% more weight because we have not needed to be as active in our portfolio management adjustments. BRK-B shows strong momentum with a value/quality tilt and positive technicals. We were also decently underweight financial holdings in the equity model.

Equity Model

- *Initiate a 1.5% position in Berkshire Hathaway B-Shares (BRK-B)*
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