Portfolio Trade Alert - November 6, 2023

Trade Alert - Equity And ETF Models

This morning, we made a few trades in both portfolios.

Given Apple?s string of weak revenue growth, we shifted 1% of Apple (AAPL) to Microsoft (MSFT) and Google (GOOG) which are continuing to show strong gains in both revenue and earnings growth. However, given AAPL's weight in the index, and the implications of ETF flows, we are maintaining a sizable holding in the stock.

We also increased Comcast (CMCSA) by 0.50% and added 1% to Costco (COST.) CMCSA and COST look good technically, and we have been wanting to add to each. On the sector side, we added 1% to XLK and XLP and half a percent to XLC. We now stand at 58.5% equities in the equity model and 57% in the sector model.

Equity Model

- *Reduce Apple (AAPL) by 1% of the portfolio*
- *Add 0.5% of the portfolio each to Microsoft (MSFT) and Google (GOOG)*
- *Increase Comcast (CMCSA) by 0.50% of the portfolio.*
- *Add 1% of the portfolio to Costco (COST)*

ETF Model

- *Increase the iShares Technology Sector ETF (XLK) by 1% of the portfolio.*
- *Add 1% of the portfolio to the iShares Staples ETF (XLP)*
- *Increase the iShares Communications ETF (XLC) by 0.50% of the portfolio*

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