



Portfolio Trade Alert - November 7, 2024

Trade Alert - All Models

With the election behind us, we are rebalancing the Equity and ETF models and adding some Small/Mid-cap exposure. We are also bringing the Dividend Equity Model up to total weighting for the rest of the year. In the Dividend Equity Model, the maximum weighting of the top 6 stocks is 6% each. The remaining 20 are weighted at 3.33% each. We also leave 2-3% in cash for future needs.

For all portfolio weightings, [CLICK HERE](#) and view each model position for the current market weight. The weights are never exact, but you can round to the nearest half percentage. For example, if Apple (AAPL) is 4.16% of the portfolio, its weight is 4%.

Equity Model

- *Add 1% of the Russell 2000 Index ETF (IWM) to the portfolio.*
- *Sell 100% of Stanley Black & Decker*
- *Increase Ely Lilly to 3% of the portfolio.*

ETF Model

- *Add 1% of the Russell 2000 Index ETF (IWM) to the portfolio.*

Dividend Equity Model

Please review the model for all current holdings and weighting changes.

- *Sell 100% of Stanley Black & Decker (SWK)*
- *Add 3.33% of Internation Business Machines (IBM)*

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