Portfolio Trade Alert - November 8, 2023

Trade Alert - Equity And ETF Model

On October 6th, as yields were shooting higher on the 10-year Treasury Bond, we discussed that we were adding a trading position to our portfolio by increasing our stake in the Vanguard Extended Duration Bond ETF (EDV).

That trade has worked out well, with EDV rallying sharply over the last week and hitting the 50-DMA, our initial target for the trade. We are now taking profits in that trade in both models and reducing EDV back to the portfolio model allocation.

Both Models

- *Reduce EDV back to its original portfolio model allocation weight of 12%.*

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