



Portfolio Trade Alert - October 1, 2024

Trade Alert - Dividend Equity Model Only

In August, we sold Phillip Morris (PM) due to its incredible run this year to take profits. However, PM and its sister company, Altria (MO), have made decent corrections since that sale and worked off much of that previous overbought condition.

At the same time, one of the underperforming companies with a lower dividend yield also rose with the recent market rampage, allowing us to swap a 2.11% yield for a 7.9% yield in the portfolio with MO.

Dividend Equity Model

- *Sell 100% of Fastnel (FAST)*
- *Buy 1.5% of the portfolio in Altria (MO)*

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