



Portfolio Trade Alert - October 15, 2024

Trade Alert - Equity & ETF Model

We added to our energy exposure a couple of months ago, expecting a counter-trend rally in energy stocks from a move higher in oil prices. Shortly afterward, the conflict between Israel and Gaza escalated and spilled over into Iran. With the situation stabilizing, oil prices have peaked short-term, so we will rebalance our energy holdings back to target to capture some of the recent gains.

Equity Model

- *Reduce Exxon Mobil (XOM) to 1.25% of the portfolio*
- *Sell down Diamondback Energy (FANG) to 1% of the portfolio.*
- *Reduce OneOk (OKE) to 1.75% of the portfolio.*

ETF Model

- *Reduce iShares Energy ETF (XLE) to 4% of the portfolio.*

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