



Portfolio Trade Alert - October 2, 2023

Trade Alert - Equity And ETF Models

This morning, we added a little tech exposure to both models. Tech led the way lower and appears to be the first sector to trigger buy signals. If the upward trend is to resume, it's likely that the stocks that led the way higher are likely to continue. We added the S&P Semiconductor ETF (SMH) instead of the iShares Technology ETF (XLK) in the sector model to get more exposure to the chip sector. We chose SMH over SOXX as it is lower dollar-priced and has more exposure to NVDA and TSM. They have performed similarly. In the Equity model, we increased weightings in Nvidia (NVDA) and AMD (AMD).

Equity Model

- *Increase Nvidia (NVDA) from 1% to 2% of the portfolio.*
- *Add to AMD (AMD) and bring its portfolio weighting to 2.5%*

ETF Model

- *Add 2% of the S&P Semiconductor ETF (SMH) to the portfolio.*

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