



## Portfolio Trade Alert - October 6, 2023 - 2

### Trade Alert - Equity Model ONLY (THIS IS NOT AN RIA CLIENT PORTFOLIO TRADE)

As you know, we recently sold the 20-Year Bond ETF (TLT) in our client accounts and swapped it for actual 20-Year Treasury Bonds. However, in the SimpleVisor portfolio model, we are unable to get pricing for actual bonds, therefore, we swapped TLT for a longer-duration Vanguard Bond ETF (EDV.)

With that understanding, in the **SimpleVisor EQUITY and ETF MODELS ONLY** we are taking the opportunity of the deeply oversold condition of bonds, not to mention a near-record deviation from the 200-DMA. **As such, we are adding a TRADING POSITION of EDV to our portfolios. This is a temporary position for trading purposes only**, and we will sell it when bonds return to an overbought condition.

To reiterate, this trade is for the SimpleVisor account model only and NOT for RIA CLIENT ACCOUNTS that own actual bonds.

### Equity & ETF Model

- *Increase the Vanguard Extended Bond ETF (EDV) to 15% of the portfolio.*

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