



Portfolio Trade Alert - October 8, 2026

Portfolio Trade Update: Equity Model

We are finishing up our portfolio rebalancing for the end of the year. We previously took gains in our large-cap growth stocks and increased our more value-oriented holdings. Today, we are taking losses in Vertiv (VRT) and Applied Digital (APLD) to offset those gains and are adding Berkshire Hathaway (BRK.B) back to the portfolio.

We continue to like the positioning of APLD and VRT in the data center space, but higher interest rates are negatively impacting small and mid-cap stocks. Once we see these companies begin to improve price-wise, we will look to rebuild these positions.

Equity Model Trades

- *Sell 100% of APLD and VRT*
- *Buy 2% of the portfolio in Berkshire Hathaway (BRK.B)*

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