



Portfolio Trade Alert - September 21, 2023

Trade Alert - Equity Model Only

We previously owned Albemarle (ALB) due to its leading position in lithium production. We had bought and sold it numerous times previously for a good gain. We re-entered the position with a very small sizing (1% of the portfolio) as a starter position for a new holding. However, the materials sector remains under pressure, and the technical setup for ALB is failing. We are stopped out of the position today.

Small and mid-capitalization stocks continue to underperform so we are stopping out of the Russell 2000 Index ETF (IWM) in the ETF Model.

Equity Model

- *Sell 100% of Albemarle (ALB)*

ETF Model

- *Sell 100% of the Russell 2000 Index ETF (IWM)*
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