



Portfolio Trade Alert - September 23, 2024

Trade Alert - Equity & ETF Models

In the Equity and ETF models, we added exposure to the "Mega-cap" and Financial space, which should benefit from lower rates. Our models are very underweight Financials relative to the benchmark, so we are adding 2% of J.P. Morgan Chase to the Equity model and 2% to the Financial sector ETF (XLF).

On the "Mega-cap" side of the portfolio, we are adding Amazon (AMZN), which tends to perform better during the holiday shopping season, and increasing the Mega-cap Growth ETF (MGK) in the ETF model.

Lastly, on the bond side of the portfolios we are taking the first steps to increase our portfolio durations overall. We selling half of our iShares 3-7 Year Treasury Bond ETF (IEI) and adding that to the iShares 7-10 Year Treasury Bond ETF (IEF).

Equity Model

- *Buy 2% of the portfolio in JP Morgan (JPM)*
- *Increase Amazon (AMZN) to 3.25% of the portfolio.*
- *Sell 50% of IEI*
- *Increase IEF with the proceeds of the sale from IEI.*

ETF Model

- *Buy 2% of the portfolio in the SPDR Financial Sector ETF (XLF)*
- *Add 2% of the Vanguard Megacap Growth ETF (MGK)*
- *Sell 50% of IEI*
- *Increase IEF with the proceeds of the sale from IEI.*

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