



Portfolio Trade Alert - September 25, 2025

Trade Alert - Rebalancing All Thematic Models

As we approach quarter-end, we are rebalancing the new "*thematic portfolios*" as part of the regular portfolio management process.

If you were unaware of the new models, they are located under the PORTFOLIOS tab and ready for you to invest directly into them. [CLICK HERE](#)

In the majority of the portfolios, we made minor adjustments to rebalance to target weights. However, we made more significant changes in the models below.

AI Model

- *Sell 100% of Intuitive Surgical (ISRG)*
- *Buy 3% of the portfolio into Core Weave (CRWV)*

Growth Focused Model

- *Sell 100% of Intuit (INTU)*
- *Buy 3% of Core Weave (CRWV)*

Small-Mid Cap Model

- *Sell 100% of Toast (TOST) and Duolingo (DUOL)*
- *Buy 3% of Applied Digital Corporation (APLD) and Core Weave (CRWV)*

Crypto Model

- *Sell 100% of ARKK Bitcoin ETF (ARKB)*
- *Buy 17% of the iShares Ethereum ETF (ETHA)*

Accumulator Model

In this model, so we can lower the minimum threshold for investment to \$2000, we are swapping ETFs to lower the dollar investment amounts.

- *Sell 100% of SPY, QQQ, and IWM*
- *Buy 30% of SPLG, 30% of QQQM, and 15% of VTWO.*

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