



# Portfolio Trade Alert - September 27, 2024

## Trade Alert - Equity & ETF Models

With the much-needed correction in bond yields in progress, we are taking the opportunity to shift some of our very short-duration bond holdings to a bit longer duration. In the ETF and Equity model, we are reducing the iShares 1-3 Year Treasury Bond ETF (SHY) and shifting it to the iShares 3-7 Year Treasury Bond ETF (IEI.) We are not changing our total bond weightings, just adjusting the holdings to extend the duration. As bond yields correct, we will continue this process across the bond portfolio.

In the Equity model, we are reducing GE Vernova (GEV) back to the target weight after an extensive run higher.

### Equity Model

- *Reduce GEV to 1% of the portfolio.*
- *Reduce SHY by 5% of the portfolio and increase IEI by the same amount.*

### ETF Model

- *Reduce SHY by 5% of the portfolio and increase IEI by the same amount.*
- 

## Want These Alerts Via TEXT?

To receive trade information via text, click on your user name in the upper right corner of the website. **Then click My Account and the title SMS Notification Preferences.**

**NOTE: You must add your country code in front of your number.** The U.S. code is 1.

Please let us know if you have any problems.