



Portfolio Trade Alert - August 11, 2022

Trade Alert For Equity Model Only

We are rebalancing our energy exposure in the Equity model only by selling Marathon Oil (MRO) and adding to Exxon Mobil and Devon Energy. Energy has gone through a decent correction and turned back on short-term buy signals, and with a weakening dollar, such should bode well for energy stocks. While we like MRO, the consolidation into XOM and DVN boosted our overall dividend yield of the portfolio.

Equity Model Only

- *Sell 100% of Marathon Petroleum (MRO)*
- *Increase XOM to 2% of the portfolio.*
- *Increase DVN to 2% of the portfolio.*