



Portfolio Trade Alert - October 10, 2022

Trade Alert For Equity & ETF Models

We shed a little exposure this morning to the energy sector, which has been red hot. The Energy sector, XLE, beat the S&P 500 by about 8% last week. Crude is up from \$77 to \$92 in just two weeks which we have been discussing was likely in our 3-minutes videos.

We also sold 1% of Public Storage (PSA.) We are starting to do some tax loss selling for year-end purposes to offset the gains we took early this year. We still like PSA as a position and will add back to it later. Also, PSA is the most overbought stock within the REIT sector. We are looking to initially replace that reduction in PSA with either Digital Reality (DLR) or American Tower (AMT) as they are grossly oversold.

Equity Model

- *Reducing XOM and DVN by 0.5% each*
- *Trimming PSA by 1%.*

ETF Model

- *Reducing XLE by 1%.*