



Portfolio Trade Alert - October 17, 2022

Trade Alert For Equity & ETF Models

When the Federal Reserve breaks something, the yield curve will UN-invert rapidly, which will bode well for financial-related stocks. While we will add some direct exposure to bank stocks, we continue to add to our holding of iShare Preferred Income ETF (PFF), which is currently carrying a dividend yield north of 5%.

Equity Model

- *Increase PFF by 1% of the portfolio, bringing the total weight to 3%.*

ETF Model

- *Increase PFF by 1% of the portfolio, bringing the total weight to 3%.*