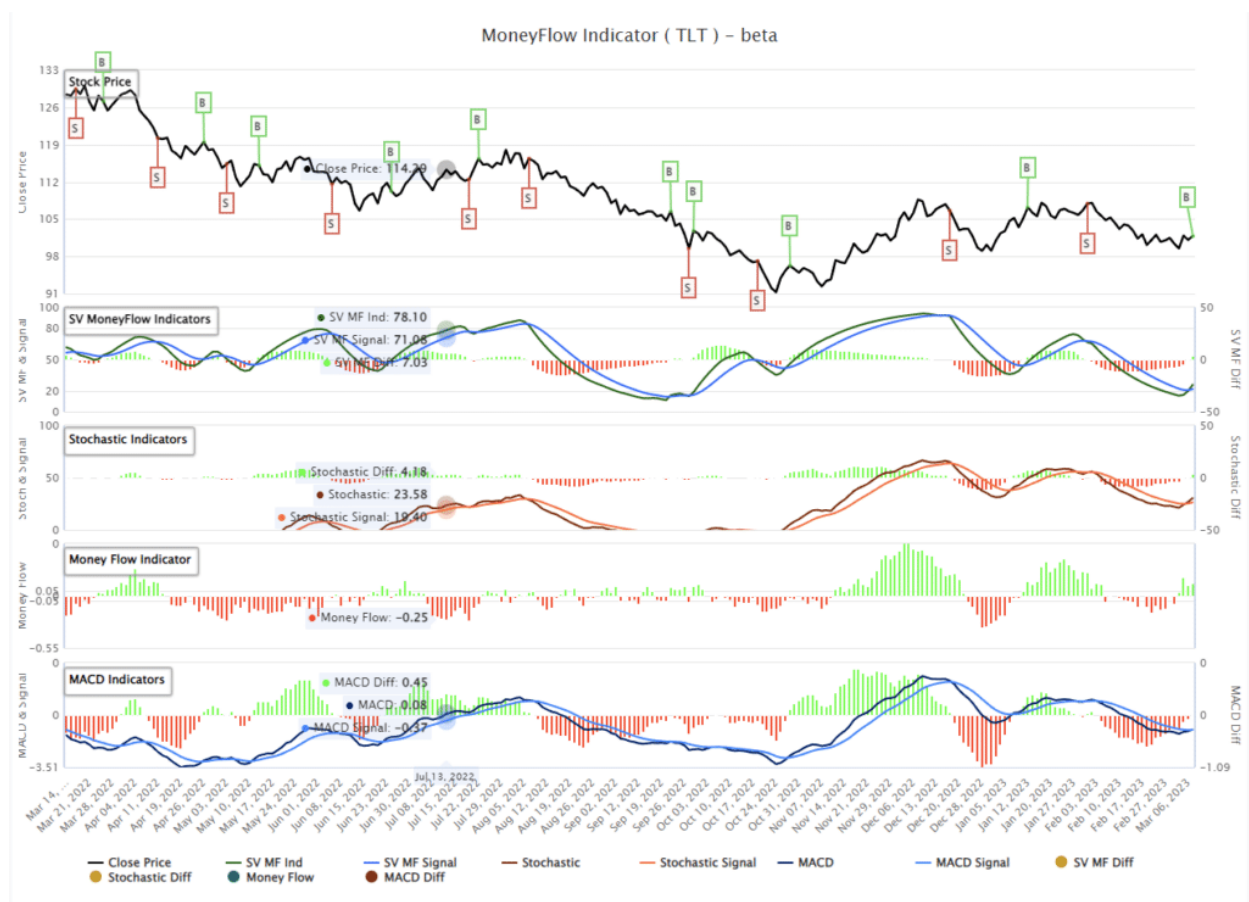


Portfolio Trade Alert - March 7, 2023

Trade Alert For Equity And ETF Models

We have recently discussed beginning to shift the duration of our bond holdings to a longer-term time frame in anticipation of economic weakness and an eventual reversal of Fed policy. We started by shifting 1-3 month Treasuries (BIL) to 1-3 year Treasuries (SHY). Today, with our ["money flow buy signal"](#) triggering from an oversold level, we are bringing the iShares 20-Year Treasury ETF (TLT) to target weight. We will build on this small move as we continue to slowly lengthen the duration of the overall bond holdings in our portfolios.



Both Models

- Rebalance iShares 20-Year Treasury Bond ETF (TLT) To 10% Of The Portfolio