



Portfolio Trade Alert - March 9, 2023

Trade Alert For Equity & ETF Models

This morning we added 2.5% SPY to both models. We also bought CVS and XLV back up to their model weights.

SPY is closing in on a buy signal. We may ultimately buy 5-7.5% over the next week. Given the risk with the employment report tomorrow and CPI on Tuesday, we decided to leg into the trade. Despite Powell's hawkishness, we found it encouraging the market held up yesterday and this morning. If we are wrong, there are clear stop levels in various moving averages and the rising lower trend line. �

Equity Model

- *Initiate a 2.5% position in the S&P 500 Index ETF (SPY)*
- *Bring CVS Health (CVS) to the model weight of 3% of the portfolio.*

ETF Model

- *Initiate a 2.5% position in the S&P 500 Index ETF (SPY)*
- *Bring iShares Health Care ETF (XLV) to the model weight of 8% of the portfolio.*