



## Portfolio Trade Alert - August 17, 2023

### Trade Alert - Equity Model Only

This morning we swapped our 1.5% in IWM for CSCO in the equity model. In the sector model, we are leaving IWM. This will better align small-cap exposure in both portfolios. CSCO adds to our technology weighting, which we have been trying to increase. It also has somewhat of a value tilt with a P/E<20 and a 2.85% dividend. &#2013266080;

- *Sell 100% of Russell 2000 Index ETF (IWM)*
- *Buy 1.5% of the portfolio in Cisco Systems (CSCO)*

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