



Portfolio Trade Alert - November 10, 2023

Trade Alert - Equity And ETF Model

Over the last few weeks, we discussed using the potential market rally to rebalance risks and make portfolio adjustments. That rally has been very strong, and with the markets now overbought, we are continuing that process.

Today, we are using the rally to start our annual process of tax loss harvesting. While we fundamentally like the companies being sold, they are good candidates to reduce portfolio risks in the near term and provide a tax benefit in the future. We will potentially buy these companies back at some point after the 30-day period the IRS requires to avoid "wash sales."

The trade details are as follows:

Equity Model

- *Sell 100% of Abbott Laboratories (ABT). CVS (CVS) and Altria (MO).*
- *Reduce Public Storage (PSA) to 1.5% of the portfolio.*
- *Increase Stanley Black & Decker (SWK) to 2.5% of the portfolio.*

ETF Model

- *Sell 100% of the Vanguard High Dividend Yield ETF (VYM).*

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