



Portfolio Trade Alert - December 19, 2023

Trade Alert - Equity Model Only

We are selling PNC Bank (PNC) in the equity model after a significant run since the October lows. The stock has retraced a chunk of its previous decline, is extremely overbought, and there remains some risk to the regional bank sector heading into 2024. We are going to book the gain against some of our tax-loss sells in November. We will wait for a short-term market correction to redeploy that cash.

Equity Model

- *Sell 100% of PNC Bank (PNC)*

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