



Portfolio Trade Alert - January 12, 2024

Trade Alert - Equity Model Only

This morning, United Healthcare (UNH) reported stronger-than-expected earnings and revenue. Despite the good news, the stock opened lower by 5%. The decline is a function of rising costs. Despite rising expenses, their profit guidance is unchanged. This morning's sell-off allowed us to add to our position, as we have wanted to. We added 1% of UNH to the equity model.

Equity Model

- *Add 1% of the Portfolio to United Healthcare (UNH)*

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