



Portfolio Trade Alert - January 24, 2024

Trade Alert - Dividend Equity Model

We launched the Dividend Equity Growth Model yesterday and bought the initial 1/3 of all positions. We noted then we are looking for opportunities to increase exposure to those holdings. The declines in 3M (MMM) and Kimberly-Clark (KMB) following earnings are an opportunity to add to those positions again, bringing our cost basis down. We executed those trades at the open this morning.

Dividend Equity Model

- *Increase 3M (MMM) to 2.3% of the portfolio.*
- *Increase Kimberly-Clark (KMB) to 2.3% of the portfolio.*

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