



Portfolio Trade Alert - January 25, 2024

Trade Alert - All Models

This morning, we are using the recent declines in some sectors to increase our portfolio exposure slightly. As we have noted previously, we want to maintain our overall equity exposure and opportunistically use the markets to increase that exposure toward target portfolio weights. We are doing that as detailed in the models below. With the overall market overbought, we are still underweight equity exposure, and hopefully, we will get an opportunity soon to move portfolios closer to target weights.

Equity Model

- *Reduce AMD (AMD) to 3% of the portfolio (taking profits after a huge run.)*
- *Increase Comcast Communications (CMCSA) to 4% of the portfolio.*
- *Increase United Healthcare (UNH) to 3.5% of the portfolio.*

ETF Model

- *Initiate a 1% of the portfolio position in SPDR Basic Materials ETF (XLB).*
- *Increase SPDR Healthcare ETF (XLV) to 9.25% of the portfolio.*

Dividend Equity Model

- *Increase CVS Health (CVS) to 2.1% of the portfolio.*

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