



Portfolio Trade Alert - February 2, 2024

Trade Alert - All Models

As noted yesterday, we are using earnings weakness and other price opportunities to continue building out the **Dividend Equity Model**. Today, we are adding another 1/3rd of target position sizes to Apple, Abbvie, Google, Goldman Sachs, JP Morgan, and Coca-Cola.

In the Equity and ETF models we are shifting duration in bond portfolios by reducing our large weighting in 1-3 year T-Bills (SHY) to 7-10 year Treasury bonds (IEF.) With the Federal Reserve cutting rates this year, and the recent pullback providing an entry point, we are shifting our duration mildly.

Dividend Equity Model

- *Increasing current holds by the same amount as the original buys.*
 - *Apple (AAPL), Abbvie (ABBV), Google (GOOG), Goldman Sachs (GS), JP Morgan (JPM), and Coca-Cola (KO).*

Equity And ETF Models

- *Sell 5% of the iShares 1-3 Year Treasury Bill ETF (SHY)*
- *Initiate a 5% position in the iShares 7-10 Year Treasury Bond ETF (IEF)*

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