



Portfolio Trade Alert - April 16, 2024

Trade Alert - Equity Model

This morning, United Healthcare (UNH) reported results that beat expectations and pushed the stock price higher. However, while earnings were good, the ongoing issues with Medicare have plagued the company for the last few quarters, and those issues are not abating. Therefore, we will use the rally to leave the stock for now and somewhat reduce our exposure to healthcare.

With that said, we are using the recent selloff to add to a couple of smaller holdings. We are adding to Ely Lilly (LLY), benefitting from the surging demand for weight loss drugs, and to Palo Alto Networks (PANW) for ever-increasing cybersecurity needs, particularly with the rise of Artificial intelligence.

Equity Model

- *Sell 100% of United Healthcare (UNH)*
- *Increase Ely Lilly (ELY) to 2.5% of the portfolio.*
- *Add to Palo Alto Networks (PANW), increasing it to a 1.5% weighting.*

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