



Portfolio Trade Alert - March 24, 2022

Trade Alert For Equity & ETF Models

As we discussed previously gold has been the process of completing a "cup and handle" technical pattern and a breakout above the recent high would portend to further upside. With the recent pullback, gold is back to oversold conditions and is close to triggering a buy signal. As such we are adding a 2% position in IAU to both models which we will scale higher if the trade begins to work as expected.

We are also taking profits in two VERY overweight positions and reducing them back to normal model weights. Abbvie (ABBV) we are trimming from 4.9% to 4.0% of the portfolio, and Ration Technologies (RTX) from 2.5% to 2%.

Equity Model

- *Add 2% of the portfolio value in IAU*
- *Reduce ABBV to 4% of the portfolio.*
- *Reduce RTX to 2% of the portfolio.*

ETF Model

- *Add 2% of the portfolio value in IAU*