

INTRA360 AI-ASSISTED 3-MONTH PORTFOLIO REPORT

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 Target capital: \$10,000
 Decision-support report - not financial advice

Weekly Management Summary

Policy: Weekly updates prioritize existing winners. Rotation is suggested only when a position weakens or a new candidate is clearly superior. Time-aware logic suppresses false TRIM/REPLACE calls on back-to-back runs.

Compared against: intra360_longterm_allocator_20260526_080531.pdf

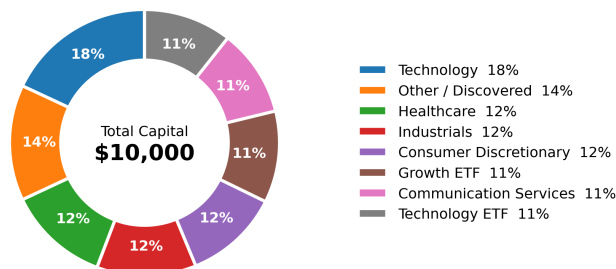
Days since prior report: 1.2

New: AAPL, AMZN, CAT, F, GOOGL, QQQ, TQQQ, XLK **Kept:** AMD, UNH **Rotation Review:** INTC, NVTS, SOXL

Portfolio Overview

Total capital: \$10,000
Hold target: Minimum 3 months
Positions: 10
Replacement threshold: 10.0 points
Technology: 18.0%
Other / Discovered: 14.1%
Healthcare: 12.2%
Industrials: 11.9%
Consumer Discretionary: 11.5%
Growth ETF: 11.1%
Communication Services: 10.6%
Technology ETF: 10.6%

Portfolio Allocation



Concentration risk: BALANCED
Nasdaq/growth-style exposure: 61.8%
Risk flags: Moderate Nasdaq/growth concentration

Recommended Allocation & Weekly Action

Rank	Symbol	Action	Sector	Score	Allocation	Qty	Risk
1	AAPL	NEW	Technology	100.0	\$1,185	3.8178	Tech sector and valuation risk. Nasdaq/growth correlation risk; verify portfolio concentration.
2	AMZN	NEW	Consumer Discretionary	100.0	\$1,150	4.2386	Some volatility and sector cyclicality risk. Nasdaq/growth correlation risk; verify portfolio concentration.
3	GOOGL	NEW	Communication Services	100.0	\$1,058	2.6987	Moderate drawdown and tech sector risk. Nasdaq/growth correlation risk; verify portfolio concentration.
4	UNH	HOLD	Healthcare	100.0	\$1,224	3.2061	Moderate drawdown risk in volatile markets.
5	CAT	NEW	Industrials	98.1	\$1,193	1.3136	Cyclical sector risk and moderate volatility.
6	TQQQ	NEW	Other / Discovered	88.8	\$700	8.6069	High leverage and volatility risk.
7	F	NEW	Other / Discovered	86.0	\$705	44.1639	Sector cyclicality and volatility.
8	AMD	HOLD	Technology	100.0	\$613	1.2403	Higher volatility and sector concentration risk. Nasdaq/growth correlation risk; verify portfolio concentration.

Rank	Symbol	Action	Sector	Score	Allocation	Qty	Risk
9	XLK	NEW	Technology ETF	100.0	\$1,058	5.7536	Sector concentration risk in tech. Nasdaq/growth correlation risk; verify portfolio concentration.
10	QQQ	NEW	Growth ETF	97.0	\$1,113	1.5274	Tech concentration risk. Nasdaq/growth correlation risk; verify portfolio concentration.

Position Notes

1. AAPL - NEW

Weekly reason: New candidate in the current top portfolio.

AI: Consistent mega-cap growth with solid trend and moderate volatility, a core tech growth holding with broad institutional support.

Technical: trend above key moving averages; 60-day return 17.4%; recent volume confirms interest

2. AMZN - NEW

Weekly reason: New candidate in the current top portfolio.

AI: Strong multi-month returns and trend in consumer discretionary mega-cap growth, good liquidity and institutional interest.

Technical: trend above key moving averages; 60-day return 30.2%

3. GOOGL - NEW

Weekly reason: New candidate in the current top portfolio.

AI: Mega-cap growth with strong 60- and 120-day returns, solid trend, and institutional liquidity, though slightly more volatile.

Technical: trend above key moving averages; 60-day return 28.0%

4. UNH - HOLD

Weekly reason: Back-to-back/time-close run detected (1.20 days since prior report). Holding to avoid false weekly churn.

AI: Healthcare sector leader with steady returns, strong trend, and lower volatility, providing defensive ballast outside tech growth.

Technical: trend above key moving averages; 60-day return 30.4%

5. CAT - NEW

Weekly reason: New candidate in the current top portfolio.

AI: Strong industrials stock with excellent 120-day returns and solid trend, providing non-tech diversification and institutional liquidity.

Technical: trend above key moving averages; 60-day return 20.9%

6. TQQQ - NEW

Weekly reason: New candidate in the current top portfolio.

AI: Leveraged Nasdaq ETF with moderate returns but high volatility and risk, only for very tactical use.

Technical: trend above key moving averages; 60-day return 64.0%

7. F - NEW

Weekly reason: New candidate in the current top portfolio.

AI: Moderate returns and trend with elevated volatility; cyclical auto sector with some risk of weakness.

Technical: trend above key moving averages; 60-day return 20.7%; recent volume confirms interest; higher volatility risk

8. AMD - HOLD

Weekly reason: Back-to-back/time-close run detected (1.20 days since prior report). Holding to avoid false weekly churn.

AI: Strong sustained uptrend with exceptional 60- and 120-day returns in AI/semiconductors, good liquidity, and above all major SMAs.

Technical: trend above key moving averages; 60-day return 148.9%; recent volume confirms interest; higher volatility risk

9. XLK - NEW

Weekly reason: New candidate in the current top portfolio.

AI: Technology ETF with broad exposure, strong multi-month returns, and stable trend, balancing mega-cap tech growth risk.

Technical: trend above key moving averages; 60-day return 32.0%

10. QQQ - NEW

Weekly reason: New candidate in the current top portfolio.

AI: Broad Nasdaq growth ETF with stable trend and moderate volatility, good for diversified tech growth exposure.

Technical: trend above key moving averages; 60-day return 20.0%