

Research Portfolios Update

Research Portfolio Update & Holdings

Portfolio Strategy

In order to summarize the changes we have made to each Research Portfolio over the past month we introduce a compilation that includes links to each report.

This report highlights changes to the Research Portfolios from December 14, 2023 – January 10, 2024. See page 2 for a table of links to these reports.

Exhibit 1: Research Portfolio Codes

These are the internal portfolio codes

Investment Strategy

Equity Income
Equity Income & Growth
Equity Large Cap Defensive
Equity Growth
Equity Mid Cap
Equity International

Code

28S00868
28S02572
28S00872
28S00870
28S00876
28S00873

Source: BofA Global Research

BofA GLOBAL RESEARCH

11 January 2024

United States

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Compilation of Research Portfolio Change reports from December 14, 2023 – January 10, 2024:

Exhibit 2: BofA Global Research Reports

Links to our latest change reports

BofA Global Research Reports		
Title: Subtitle	Primary Author	Date Published
Research Portfolios Update: Large Cap Defensive Portfolio Changes 15 Dec	Research Portfolios	15 December 2023
Research Portfolios Update: Equity Growth Portfolio Changes 15 Dec	Research Portfolios	15 December 2023
Research Portfolios Update: International Portfolio Changes 21 Dec	Research Portfolios	21 December 2023
Research Portfolios Update: Mid-Cap Portfolio Changes 4 Jan	Research Portfolios	4 January 2024
Research Portfolios Update: International Portfolio Changes 10 Jan	Research Portfolios	10 January 2024

Source: BofA Global Research

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