

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 February 15, 2024 – March 15, 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

18 March 2024

United States

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Timestamp: 18 March 2024 05:55AM EDT

Compilation of Research Portfolio Change reports from February 15, 2024 – March 15, 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: Mid-Cap Portfolio Changes 21 Feb	Research Portfolios	21 February 2024
Research Portfolios Intraday Update: Mid-Cap Portfolio Changes 29 Feb	Research Portfolios	29 February 2024
Research Portfolios Update: Income Portfolio Changes and Rebalancing 1 Mar	Research Portfolios	1 March 2024
Research Portfolios Update: Income & Growth Portfolio Changes 4 Mar	Research Portfolios	4 March 2024
Research Portfolios Update: Mid-Cap Portfolio Changes 4 Mar	Research Portfolios	4 March 2024
Research Portfolios Update: Large Cap Defensive Portfolio Changes and Rebalancing 11 Mar	Research Portfolios	11 March 2024
Research Portfolios Update: Mid-Cap Portfolio Changes 11 Mar	Research Portfolios	11 March 2024
Research Portfolios Update: Equity Growth Portfolio Changes 12 Mar	Research Portfolios	12 Mar 2024
Research Portfolios Update: International Portfolio Changes 15 Mar	Research Portfolios	15 Mar 2024

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