

RV Entry-Level Equity Portfolio #33

with Joe Bland

September 20, 2026



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Introduction

Greetings, fellow Investors and speculators! Welcome to another edition of the RV Entry Level Portfolio. The aim of this publication is to combine technical structure with macro context to identify where capital is flowing within the cycle and why, in an increasingly reactive market environment, understanding that flow is becoming more important than ever.

This portfolio and commentary are for educational purposes only. It reflects how I personally approach markets — combining technical structure, sentiment, and macro context, all built from 20 years of trial, error, and refinement — but I'm not a qualified investment advisor, and while some of the ideas discussed may be actionable, the true value lies in understanding the process behind the trades — and not in chasing specific entries or exits.

That being said, this has been an awfully dynamic week in markets, so let's get into it!

—JB

Markets

The week beginning 14th September opened with markets under renewed pressure. Many technology stocks gapped lower as oil prices increased, further fueling market anxiety regarding inflation. With markets looking towards the Fed meeting, you could feel the pressure building with the expectation of a rate rise at high certainty. This expected tightening in conditions gave concerned tech investors, already worried about the valuations of A.I. hardware companies, another reason to reduce exposure.

On Wednesday, the Federal Reserve raised interest rates by 25 basis points to 3.75–4.00%, marking the first increase in three years. The move was widely anticipated, but the Fed maintained a hawkish tone, with the majority of policymakers expecting at least one further increase this year. Equities initially pulled back following the announcement but staged a reversal into the close, with both the Nasdaq and the Russell 2000 putting in wicks on the charts, a positive development considering the tightening effects of higher rates.

Interestingly, sentiment improved meaningfully on Thursday, and technically this helped reinforce the reversals from a day earlier. Treasury yields fell, and oil moved lower, continuing its retreat from the previous session and helping to improve fragile market sentiment. Initial jobless claims also fell to 196,000, suggesting the labor market remains resilient, an important data point considering fears of economic tightening.

The Bank of England, troubled by the same inflationary macro backdrop, subsequently held rates at 3.75%, although three members voted for an increase. The Bank also halted active gilt sales entirely until April 2027, a move which helped to take pressure off a market increasingly considered to be under too much stress.

Oil prices appear to be the deciding factor for equity market sentiment, and they eased for the week, encouraging renewed accumulation into the close on Friday even if investors continued to take a somewhat selective approach to allocations.

OIL



The advance in oil continued until price reached the 78% retracement level of the move lower since April and then backed off. This weakness persisted into the end of the week, helping to ease the intense pressure higher prices have been placing on the equity markets. The test is now the July high, and if this area breaks, then the probability of a continued move lower, back to the top of the channel, increases.

DXY



The dollar has still not weakened sufficiently to break its secular trend but remains in a weak technical position just underneath the resistance at the 100 level and in the lower region of its cyclical downtrend channel.



There is now an interesting pattern developing on the daily time frame. The move lower from the end of June has a clear 5-wave sequence, suggesting the market may now be attempting to turn down. The retracement so far has a three-wave appearance, which is fitting of a corrective pattern. Moreover, the market stalled on Friday right at the 62% retracement level, which is also chart resistance. This gives the market two reasons to reverse from current levels and places the dollar in a weak position on this timeframe heading into next week, a positive development for investors if the pattern road map continues as anticipated.

US30Y



Long-term rates are still at uncomfortably high levels, currently showing no sign of reversal.

VIX



The momentum divergence I highlighted in the last update did, in fact, lead to a spike in volatility, but this was a short episode which appeared to be driven by Fed meeting fears, and price has subsequently moved back into the declining channel as investors bought the dip.

SPX



Wednesday's low was a direct hit on the 62% retracement of the move higher from July, and the corrective nature of the move lower since August suggests the next move should be to the upside.

US100



The resistance level holding the Nasdaq back since early August was also overcome on Friday, further reinforcing the developing bullish outlook for equities.

DOW



The Dow has been much weaker, but even here, Wednesday marked a clear low point technically. It will be interesting to see whether it can reclaim its footing within the lower channel next week if sentiment improves.

BTC



BTC still finds itself just below a key technical resistance level, but its performance this week was impressive considering financial conditions tightened. The whole crypto market moved strongly higher in a remarkable show of relative strength. There was a lot of fear of a market crash surrounding a Fed rate hike, and when this did not materialize, it appears to have given crypto investors more confidence in crypto's near-term outlook. When it happens, I expect that the breakout above the May high will be an event fueling positive sentiment towards the whole space.

Macro

The Latest MIT report states clearly the case for a continued risk-on bias into 2027, reinforcing the message of continued market participation in assets that are designed to express a mid/late cycle macro regime.

The GMI financial conditions index line in black helps explain the most recent choppy period in the equity markets. It leads the Nasdaq by 3 months, and it is encouraging to see it trending higher again.



Another significant chart for the equity portfolio: US liquidity continues to rise, and this also has a tendency of front running the Nasdaq by approximately 3 months, making it a valuable consideration for near term market performance. These charts reinforce the breakout seen earlier; US/GMI liquidity are the tailwinds for the ongoing advance.



A.I. MIT Business Cycle Summary, September 14th, 2026

The latest MIT update remains constructive on the broader business cycle but acknowledges that financial conditions have tightened as higher oil prices and rising long-term yields place renewed pressure on markets. Treasury buybacks have so far struggled to contain the move in bonds, with the 10-year yield approaching 5%, while oil has climbed above \$100 following continued geopolitical tensions. However, MIT notes that the tightening remains relatively narrow, with the US dollar and short-term interest rates continuing to provide an important offset.

The distinction between short and long-term rates remains particularly important. Financial conditions based on the 10-year yield have tightened considerably, potentially pointing toward slower economic growth over the coming months. However, MIT's alternative measure using three-month rates and the dollar remains relatively supportive. With only oil and long-term yields currently tightening while the dollar and front end continue to ease, MIT believes the breadth of the tightening remains relatively benign.

Economic activity also remains resilient. Manufacturing ISM has moderated to 54.6, with new orders at 53.7, but both remain comfortably in expansion, while services activity remains particularly strong at 61.7. MIT therefore favors a period where the business cycle moves sideways rather than experiencing a meaningful downturn, with the weaker dollar and short-term rates helping to offset pressure from the long end of the bond market.

Inflation data continues to provide encouragement despite the recent oil shock. Core CPI has fallen to 2.4% year-over-year from 2.8% in May, while the three-month annualized rate is running at 2.0%. Inflation breadth has also fallen sharply, and core inflation excluding shelter remains close to 2%, suggesting underlying inflation pressures remain relatively contained. MIT argues that elevated long-term yields are therefore being driven more by Treasury issuance and insufficient demand for bonds than by a renewed acceleration in underlying inflation.

Liquidity also remains supportive over the longer term. Broad US liquidity growth accelerated to 4.3% year-over-year from 3.7% the previous week, which MIT believes should continue to support equities despite potentially choppy conditions around the midterm elections. Bitcoin also remains in an uptrend, although excess liquidity remains relatively scarce, suggesting that conditions for a more significant advance may improve later in the year as additional liquidity becomes available.

Overall, the report expects continued volatility and some moderation in economic growth as the effects of tighter financial conditions feed through. However, MIT sees a sideways business cycle as more likely than a meaningful economic contraction, with the structural AI investment cycle providing an important underlying tailwind. Raoul's longer-term hypothesis remains that the AI supercycle could ultimately overpower the traditional liquidity and debt-refinancing cycle, allowing economic growth to continue through periodic slowdowns and potentially extending the broader expansion toward 2030.

— A.I. end

Portfolio

The positions in the portfolio have been chosen specifically to align with the two macro cycles we are trading. The first being the end of the business cycle late 2026-early 2027, and the second into 2032 at the end of the generational super cycle. The header sections for the trade ideas are to help clarify the time horizon and cycle expression. This will highlight how long I plan to hold the positions, the part of the cycle they are designed to capture, and the extent to which they will need active management.

Category	Description
Core	Long-duration holdings designed to capture secular super-cycle expansion and global innovation flows. Positioned with minimal trading through cycles.
Strategic	Cycle-aware positions with strong thematic alignment. Actively managed sizing and exposure through macro cycles.
Speculative	High beta, liquidity-sensitive satellite allocations. Targeted for participation in this liquidity cycle (estimated Late 2026 – Early 2027).

The estimates below are intended purely as a visual representation, so we do need to give them a certain degree of artistic freedom. Additionally, estimates assume that the cycle runs into early 2027. Macro developments could change this as markets progress.

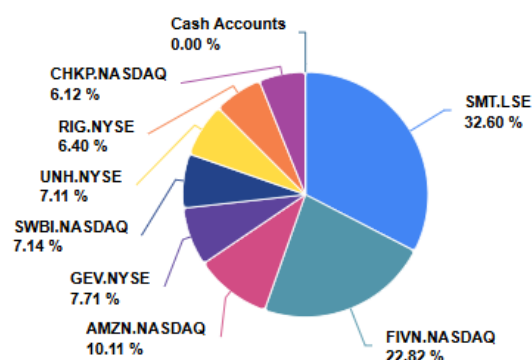
Symbol	Cycle Phase	Live Conviction	Comment
RIG	Early	6	Energy remains under-owned and has yet to fully participate.
SWBI	Early	7	Structure continues to improve but remains well behind the market leaders.
SMT	Middle	8	Innovation and liquidity beneficiaries have already advanced substantially.
GEV	Early	8	Power and electrification capex cycle remains strong, supported by structural electricity demand.
AMZN	Middle	8	Mega-cap leadership rarely remains "early" once making new highs.
UNH	Middle	8	Recovery is now well established following the secular trendline reversal.
CHKP	Early	8	Finding support on the secular channel as software leadership broadens.
FIVN	Early	8	Software leadership continues to broaden, with the recent pullback offering a constructive entry into an emerging trend.

Current Base Case

The current macro summer positioning of the economic recovery supports the argument for continued exposure to the above assets.

Portfolio Performance Snapshot: As of 9/18/2026

Symbol	Entry Price	Last Close	% Change	Notes
SMT.L	£8.52	£15.14	+77.6%	Continuing higher within the broader secular channel.
AMZN	\$181.22	\$253.71	+40.0%	Leadership remains intact with constructive rotation.
GEV	\$940.33	\$940.33	0.00%	Primary trend remains intact with price at the lower boundary.
RIG	\$5.39	\$5.64	+4.6%	Former secular resistance continuing to hold as support.
SWBI	\$11.68	\$13.64	+16.8%	Structure continues to improve with reflation tailwinds.
UNH	\$270.59	\$376.90	+39.3%	Recovery remains well established following the secular trendline reversal.
CHKP	\$130.05	\$132.71	+2.0%	Software leadership beginning to broaden.
FIVN	\$23.44	\$32.47	+38.5%	Early software leader; quarterly reversal continuing to develop.



The above chart offers a visual representation of the current allocations. I am not aiming for set percentages but will maintain stability in the portfolio with positions such as SMT, UNH, and AMZN.

Scottish Mortgage Investment Trust (SMT.L)

Bought on 8th April 2025. Price: £8.52.

Time Horizon: Core Position into 2030-32

Macroeconomic Tailwinds:

Equity Sectors: Technology, Consumer Discretionary, Healthcare, Industrials, Financials.

Style Factors: High Beta, Growth.

Current Bias / Strategy Note:

Full of growth stocks, Scottish Mortgage should perform well this year as financial conditions continue to improve. Still trading at a 10% discount to its NAV, with its price still on the lower trend line and coming off its most oversold condition in decades, it should be one to hold onto for the long term and give the portfolio a solid foundation. As interest rates ease and the economy expands, it should come back into favor with investors.

Chart from the original entry point:



Context: SMT is the main anchor to the portfolio and is holding up well, just as expected. I am not in the least bit concerned with this position at present, as it is doing its job perfectly. We just need the stock to stay between the trend lines, and we have a great position that should keep growing over time. I cannot see this trend breaking down unless we go into some serious, broad-based issues with the asset markets in general. The biggest issue with this position going forward will most likely be boredom, as it has much lower volatility than our other positions.

Quarterly chart 09/20/2026



Price action is still trending higher within the channel, and therefore I am maintaining a long-term constructive stance. (09/20/2026)

Amazon (AMZN)

Bought on 11th April 2025. Price: \$181.22.
Time Horizon: Core Position into 2030-32

Macroeconomic Tailwinds:

Sector: Consumer Discretionary/Technology, Internet Retail
Style Factors: Large Cap, Growth

Current Bias / Strategy Note:

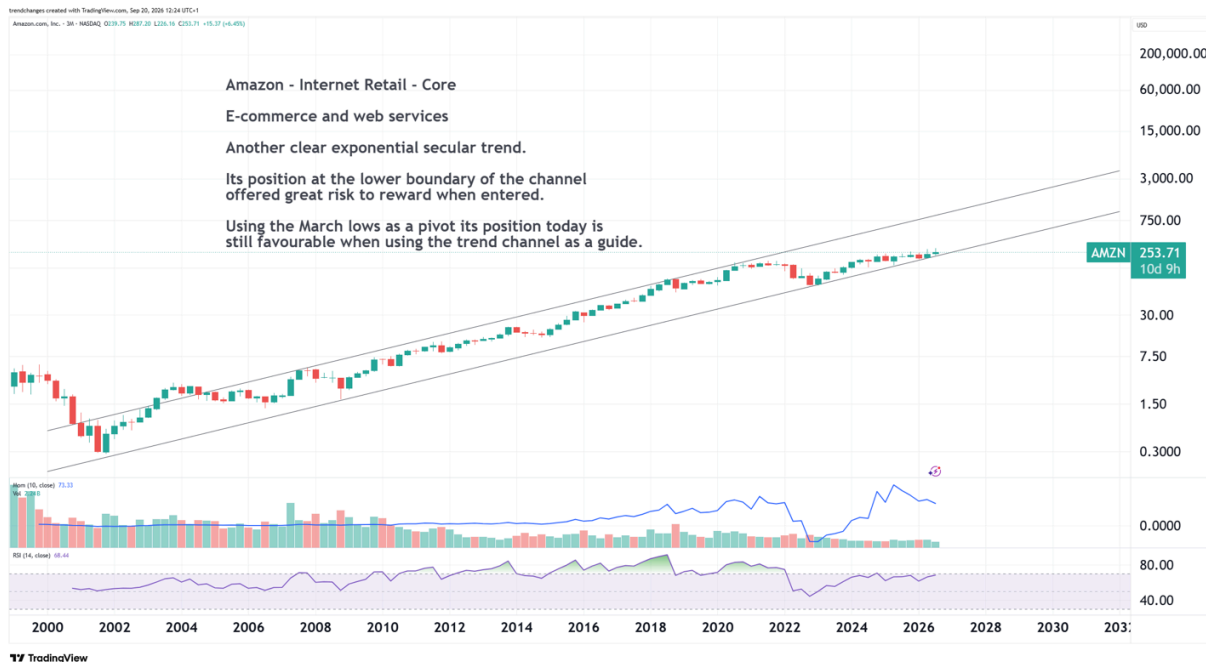
Being a high-quality, large-cap technology company with deep integrations into the consumer economy, AMZN should respond positively as we move through the expansionary phase of the macro cycle. The latest period of volatility has not done anything to change the long-term trajectory of the stock price, which is heading higher in an exponential fashion. It will add another solid foundational layer to the portfolio.

Chart from the original entry point



Context: AMZN continues to advance within its long-term trend channel and remains one of the portfolio's core technology holdings. The position provides exposure to improving liquidity conditions and broad-based participation in the technology sector while maintaining a constructive multi-year price structure.

Quarterly chart 09/20/2026



No real changes since the last update for AMZN.

The company is beginning to move higher after a successful retest of channel support. Price action is now looking stronger on the quarterly time frame, which is great to see.

Constructive outlook maintained. (09/20/2026).

Tesla (TSLA)

Bought on 8th April 2025. Price: \$222.96

Sold on Friday, 18th September 2026. Price \$364.27
+43.73% profit.

I have decided to exit TSLA for a couple of reasons. Firstly, the price is below support from the channel, which has placed it in a vulnerable position, with the latest rebound looking potentially corrective. It was this channel that gave me the original buy signal when I entered, so its breakdown is significant from that perspective.

Secondly, I feel like the higher interest-rate environment is holding it back, and as consumers often debt-finance their vehicle purchases, this has become a significant headwind for the company. This, combined with the increasing competition in the EV amount to a compelling argument to reconsider its inclusion in the portfolio.

Chart from the original entry point





The bounce after the gap lower in July has provided the opportunity to exit at a profitable level.

GE Vernova Inc. (GEV)

Bought on the 18th of September 2026. Price: \$940.33.

Time Horizon: Core Position into 2028–30

Macroeconomic Tailwinds:

Equity Sectors: Industrials, Power Generation & Electrification

Style Factors: Large Cap, Quality Growth / Infrastructure

Current Bias / Strategy Note:

GE Vernova is a global energy infrastructure company operating across power generation, electrification, and wind. Its equipment and services play an important role across the electricity supply chain, from generating power through gas and renewables to modernizing and expanding the electrical grid.

Rising electricity demand provides a powerful structural tailwind as AI data centers, advanced manufacturing, and broader electrification increase requirements for both generation capacity and grid infrastructure. This demand is already translating into accelerating orders, with second-quarter 2026 orders increasing 88% organically and backlog reaching \$176 billion, led by Power and Electrification. Data-center orders alone exceeded \$5 billion during the first half of 2026.

Within the portfolio, GEV provides exposure to the physical infrastructure required to support the AI and electrification investment cycle. Its combination of power generation, grid infrastructure, and a large services business provides a more diversified way of participating in rising electricity demand, while continued backlog growth offers visibility into longer-term revenues as the investment cycle develops.

Chart from the original entry point



Context: The retracement to the lower boundary of the uptrend channel presents an attractive opportunity for a strategic entry into GEV to capture the next anticipated move higher. Approaches to these areas usually result in renewed accumulation during favorable market conditions.

Transocean (RIG)

Bought on the 6th of February 2026. Price: \$5.39.
Time Horizon: Strategic Position into 2027+

Macroeconomic Tailwinds:

Sector: Energy Services, Offshore Drilling
Style Factors: Mid Cap, Cyclical, High Beta

Current Bias / Strategy Note:

Transocean sits at the far end of the global energy supply curve, where years of underinvestment have created structural scarcity. As energy security becomes increasingly strategic rather than purely economic, offshore drilling stands to benefit from improving utilization and pricing power. RIG typically performs later in the cycle and can often run across multiple sub-cycles once conditions turn supportive. Within the portfolio, it acts as both a late-cycle opportunity and an effective hedge against international geopolitical stress.

Chart from the original entry point



Context: The Elliott Wave labels demonstrate how I am thinking about the price action from a structural perspective. The move up from the Covid lows was wave 1, while the April Trump tariff volatility represented wave 2. Price should now be entering either a 3rd wave advance or a C-wave higher. Both outcomes remain constructive for a long position, and I am looking forward to seeing how the structure develops from here.

Weekly chart 09/20/2026



Slight dip in price here since the last update, but nothing concerning.

RIG continues to stabilize above the long-term downtrend and appears to be positioning for another move higher. (09/20/2026).

Smith & Wesson Brands Inc (SWBI)

Bought on the 6th of February 2026. Price: \$11.68.

Time Horizon: Strategic Position into 2026–28

Macroeconomic Tailwinds:

Sector: Consumer Discretionary, Sporting Goods

Style Factors: Mid Cap, Value / Cyclical

Current Bias / Strategy Note:

Although often categorized emotionally, SWBI trades structurally like a consumer discretionary stock. Demand responds to liquidity, confidence, and behavioral shifts rather than technological narratives. As financial conditions improve, discretionary spending tends to recover, while periods of domestic uncertainty can provide an additional demand backstop. This dual nature allows SWBI to participate in reflation while offering portfolio resilience should confidence fracture.

Chart from the original entry point



Context: The moves in SWBI appear to align closely with the liquidity cycle, with breakouts occurring near cyclical lows followed by advances into the later stages of the cycle. It is a slower-moving position that I am monitoring primarily on the quarterly timeframe.

Weekly chart 09/20/2026



The latest pullback appears to be nearing its end and may be turning at the 50% retracement of the latest 5 waves higher.

The position continues to behave as expected. (09/20/2026).

UnitedHealth Group (UNH)

Bought on the 1st of April 2026. Price: \$270.59.

Time Horizon: Core Position into 2028–30

Macroeconomic Tailwinds:

Sector: Healthcare, Managed Care

Style Factors: Large Cap, Quality / Defensive Growth

Current Bias / Strategy Note:

UnitedHealth operates a large healthcare platform combining insurance with a growing data and services division through Optum. This model provides stable, recurring revenues alongside exposure to long-term drivers such as ageing populations and rising healthcare demand. Unlike cyclical sectors, UNH benefits from consistent demand, making it less dependent on macro timing and more on execution and scale. During volatility, capital often rotates toward high-quality earnings, supporting relative outperformance. Within the portfolio, UNH provides stability against higher-beta positions, helping smooth performance during market uncertainty. While unlikely to lead in speculative phases, it remains important for diversification and capital preservation as the cycle develops.

Chart from the original entry point



Context: UNH has rebounded strongly from its secular trend channel and regained a constructive footing once again. As a defensive mega-cap, it should offer stability to the portfolio, while the purchase at a multi-decade inflection point provides a meaningful margin of safety should broader market corrections emerge.

Monthly chart 09/20/2026



UNH is still retracing the strong move higher in the first half of the year. Somewhere in the 50-62 percent area would be a fitting place for a turnaround.

No concerns at present. (09/05/2026).

Check Point Software Technologies (CHKP)

Bought on the 26th of June 2026. Price: \$130.05.

Time Horizon: Core Position into 2028–30

Macroeconomic Tailwinds:

Sector: Cybersecurity, Enterprise Software

Style Factors: Large Cap, Quality / Defensive Growth

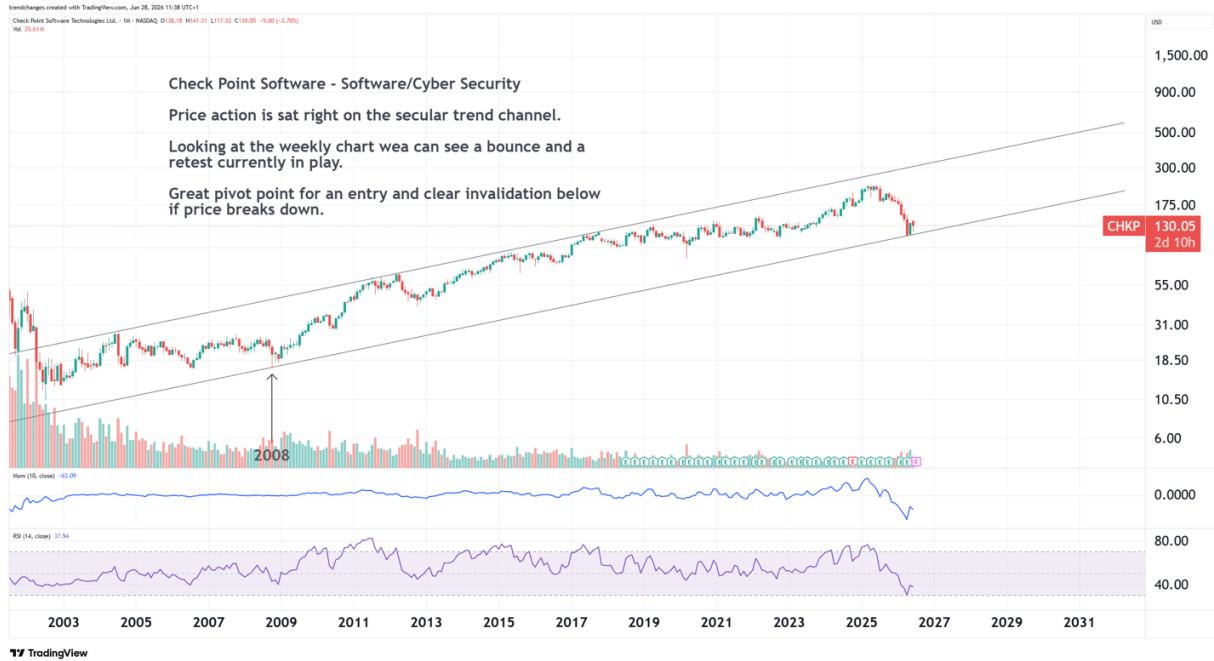
Current Bias / Strategy Note:

Check Point is a global cybersecurity leader providing network, cloud, and endpoint security solutions to enterprise customers. Its subscription-based business model generates highly recurring revenues, supported by strong cash generation and a long history of disciplined capital allocation.

As digital infrastructure continues to expand through AI adoption and increasing cloud connectivity, cybersecurity remains a structural growth market. Unlike many higher-growth software companies, Check Point combines resilient earnings with attractive valuation characteristics, making it less reliant on aggressive multiple expansion during periods of market volatility.

Within the portfolio, CHKP provides defensive technology exposure, helping balance higher-beta growth holdings while maintaining participation in the long-term digital infrastructure theme. Its quality characteristics and stable cash flows make it a suitable core holding as the business cycle continues to develop.

Chart from the original entry point



Context: A retreat to the secular trendline is positioning CHKP favorably for renewed interest from investors looking to restart accumulation. From a technical perspective, the positioning is as attractive now as it was in 2008, allowing for entry at a cyclical low. What I really like about this setup is that the asset has already bounced off the trendline in May, and the latest pullback allows for this level to be used as a trading entry pivot. The recent relative strength in software is also suggesting capital is beginning to flow more broadly into the sector, offering a valuable tailwind to the position. Additionally, being a high-quality large cap with a reasonable valuation should help with its appeal in a market still selectively positioning in growth assets.

Weekly chart 09/20/2026



Software has been relatively weaker than hardware recently, and this is being reflected in the performance of CHKP; for now, the sideways move continues. The secular trendline is just below and should offer support in the event of further weakness. (09/20/2026).

Five9 Inc. (FIVN)

Bought on the 2nd of June 2026. Price: \$23.44.

Time Horizon: Core Position into 2028–30

Macroeconomic Tailwinds:

Sector: Cloud Software, AI Customer Experience (CX)

Style Factors: Mid Cap, Quality Growth / Software

Current Bias / Strategy Note:

Five9 provides cloud-based contact center software, enabling businesses to manage customer interactions across voice, chat, email, and digital channels. Its subscription-based business model generates highly recurring revenues, while increasing adoption of artificial intelligence continues to enhance productivity and improve customer engagement.

As financial conditions improve and enterprise capital expenditure recovers, software spending should gradually broaden beyond the largest technology companies. Five9 is well positioned to benefit from this trend through continued migration to cloud communications and growing demand for AI-powered customer service solutions.

Within the portfolio, FIVN provides exposure to high-quality enterprise software with a more balanced risk profile than many emerging technology companies. Strong recurring revenues, expanding AI capabilities, and an attractive position within the broader digital transformation theme make it a suitable long-term holding as the business cycle progresses.

Chart from the original entry point



Context: FIVN is currently displaying multiple reversal signals following what appears to be the completion of a cyclical decline that began in 2021. The chart above highlights a bullish quarterly reversal accompanied by increasing relative volume, suggesting improving institutional participation. Contained within this quarterly candle is a developing five-wave advance, further supporting the case for a change in trend. Five-wave impulses typically signal the beginning of a new bullish phase, so seeing one emerge within a quarterly reversal candle strengthens the overall technical outlook.

Weekly Chart 09/20/2026

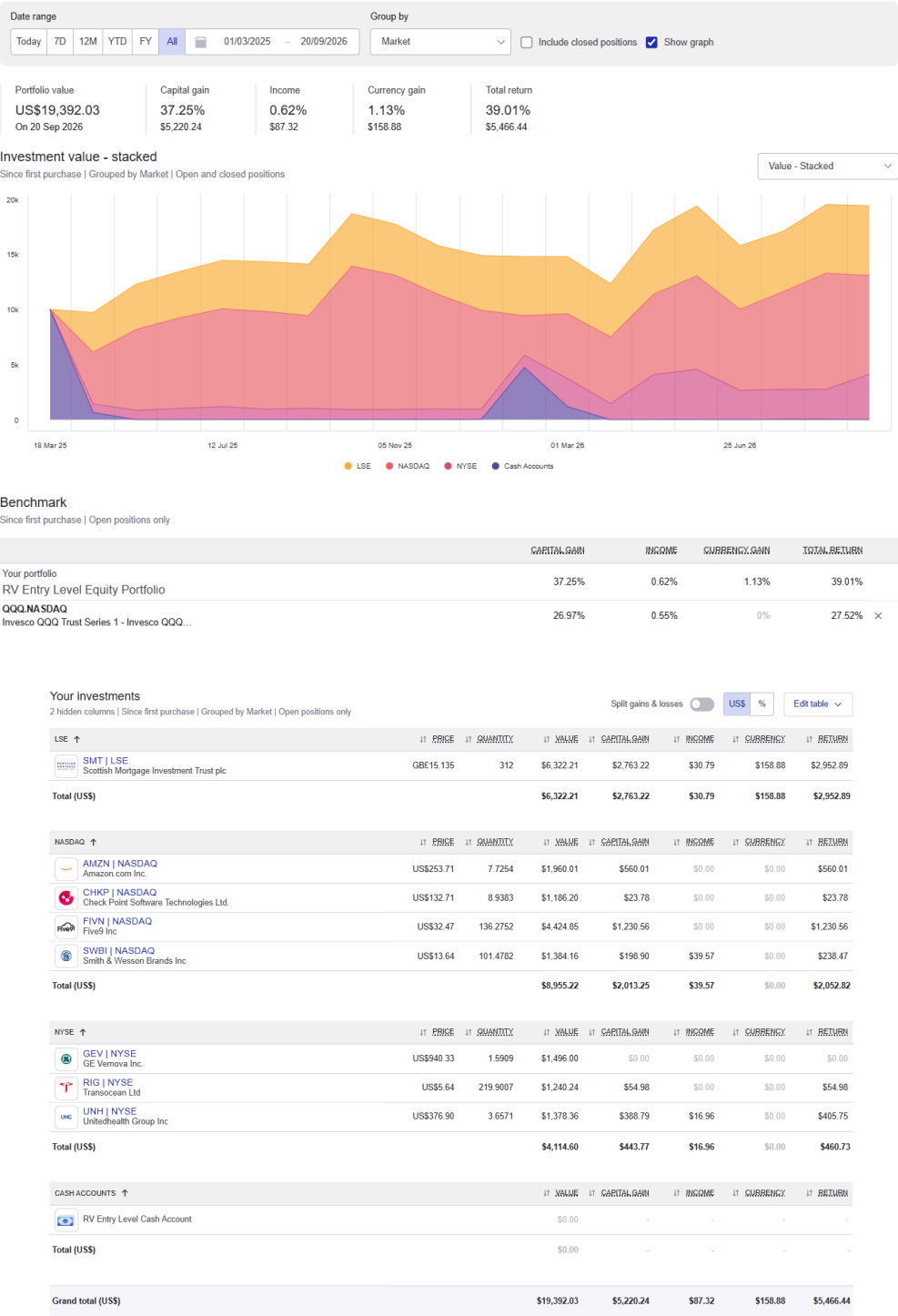


Daily Chart 09/20/2026



FIVN is in an interesting position currently. Price action has clearly broken the cyclical downtrend channel and is testing this area for support, a bullish development. However, this move has also run into the 62% retracement of the move lower since 2025, and momentum has declined into this area, so some further weakness here would not be unexpected from this perspective. Still, our entry is much lower and was taken with a longer-term view based on the quarterly reversal, which I am still using primarily as a guide currently. (09/20/2026).

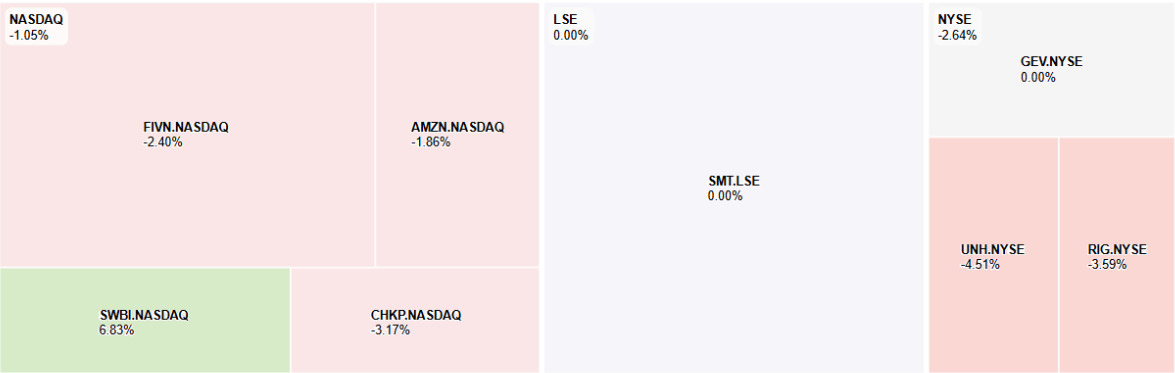
Portfolio Performance



When accounting for previously exited positions, as of Friday, the 18th of September, the current overall performance since inception is now +94%, nicely outpacing the Nasdaq at 53%.

Conclusion

The portfolio's performance has decreased from +95% to +94% since the last update. It's been sideways to lower for the portfolio over the last few weeks, with most of the holdings edging down slightly. SWBI was the savior this time; its relative strength is a feature of its rebound from a key Fibonacci level. Our software positions weakened as capital moved back to A.I. hardware stocks, but this weakness should not persist indefinitely. UNH and RIG saw the biggest declines, but I currently have no concerns with either of the positions. Oil services are volatile, and UNH is simply retracing a strong prior advance, which may have a little further to run. SMT, our largest holding, was flat, offering stability during volatility. The new position GEV has yet to contribute, and it will be interesting to see if it can stage a rally from the support of the channel as the market moves higher.



Financial conditions continue to favor equities with US liquidity still trending higher, creating a strong tailwind for our positions. The resilience of the equity markets even in the face of continued pressure from rates and energy is encouraging. The concern was that a Fed rate hike would increase volatility, but investors bought into that weakness, demonstrating that risk appetite is still ever-present. For now, the broader trend remains intact, and as long as financial conditions remain supportive, I see little reason to become overly defensive despite the volatility.

J.B

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Joe Bland

Joe has been a dedicated student of the markets for over 20 years. During this time, he has been finely tuning his skills for his trading operations. After following flawed opinion-based macro analysis in his early years, he was drawn to more reliable market signals. These came through technical and sentiment-based tools such as trend channels, Elliott Wave, Fibonacci, Japanese candlesticks, and the big picture that appears when they are all used together to find better entry and exit points.

Being very self-reliant, Joe was naturally drawn to the markets as a way to generate profits on his own — something he sees as just as valuable as the profits themselves.

He enjoys breaking things down step by step in a clear, systematic way and aims to share his thought process with members to help them on their own journey.

Joe's trade ideas on Real Vision have become some of the most popular and profitable on the platform — something he is very proud of.

In his spare time, he enjoys traveling, mountain walking, going to the gym, listening to audiobooks, and spending time with his family.

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