

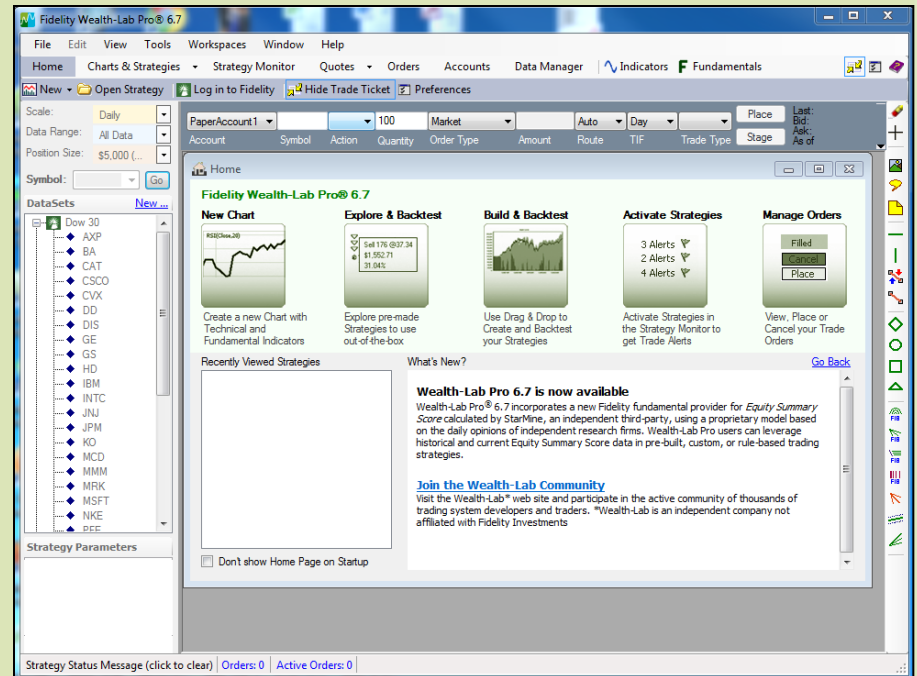


Wealth-Lab Pro®: An Introduction



This seminar will help you to ...

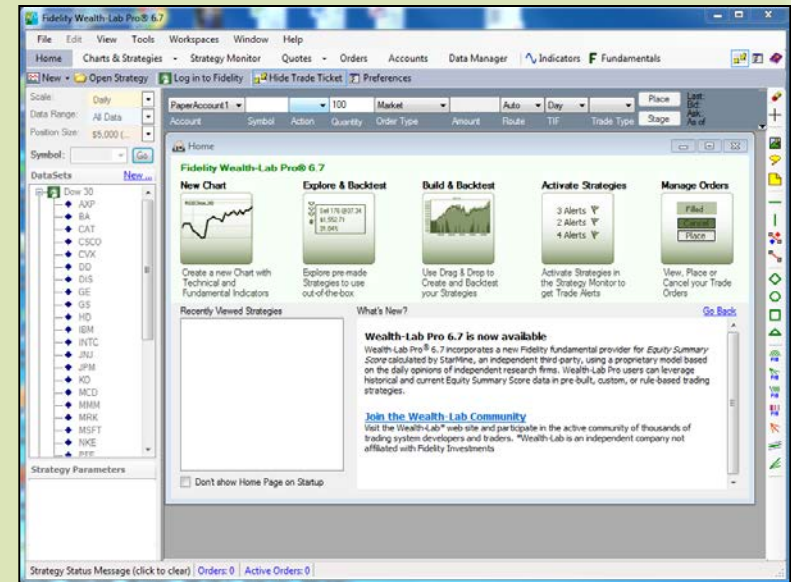
- Define trading strategy and its benefits
- Use Wealth-Lab Pro® to develop and validate trading strategies
- Locate available resources to learn more about trading strategies and Wealth-Lab Pro®



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Today's agenda

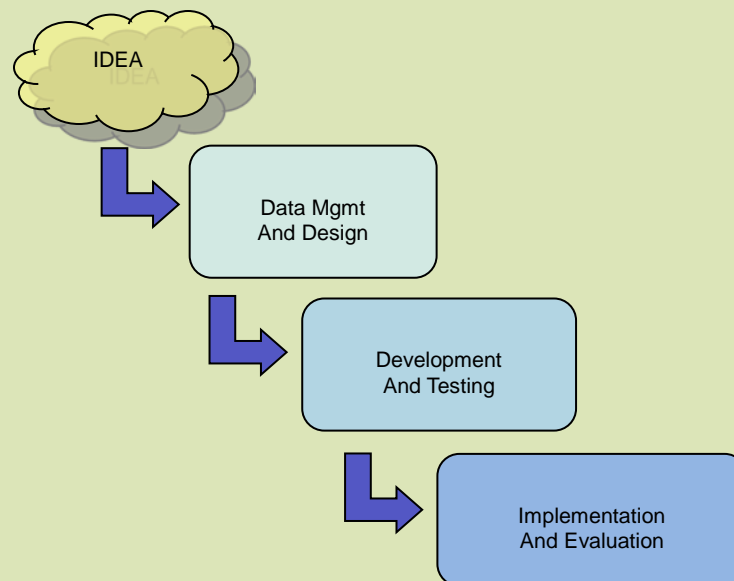
- Trading strategy – what and why
- Accessing Wealth-Lab Pro®
- Using the Data Manager Tool
- Charting – Data Visualization and Ideas
- Designing and building a trading strategy
- Resources



For illustrative purposes only.

What is a trading strategy?

- A trading strategy is:
 - A set of explicit rules that tells you when to buy, sell, sell short, and cover
 - Meant to exploit opportunities to profit in the markets – “Is my trading idea potentially profitable?”
- It is important to test a strategy in a number of different market conditions and time periods
- Start with an idea tailored to your personality, risk profile, portfolio size and available time
- Strategy testing can give you an idea of a strategy’s potential profit or loss and help build confidence



Introducing Wealth-Lab Pro®

A complete platform for developing and testing trading ideas

Helps you implement ideas in the real-world:

- Use pre-built or custom strategies
- Analyze results and adjust
- Generate trade alerts based on criteria

“Test before you trade”



Accessing Wealth-Lab Pro®

Wealth-Lab Pro®

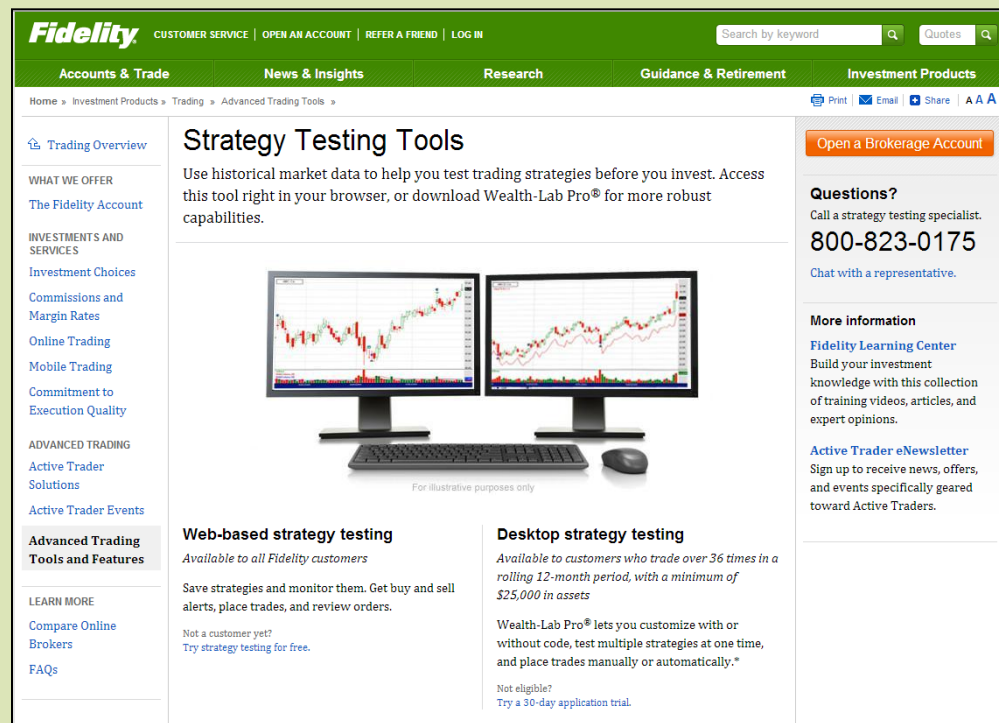
Desktop strategy testing

Available to customers who trade over 36 times in a rolling 12-month period, with a minimum of \$25,000 in assets

Fidelity.com

Web-based strategy testing

Available to all Fidelity customers



The screenshot shows the Fidelity website's 'Strategy Testing Tools' page. The header includes the Fidelity logo and navigation links: CUSTOMER SERVICE, OPEN AN ACCOUNT, REFER A FRIEND, and LOG IN. A search bar is on the right. Below the header, there are tabs for Accounts & Trade, News & Insights, Research, Guidance & Retirement, and Investment Products. The main content area is titled 'Strategy Testing Tools' and includes a sub-header 'Use historical market data to help you test trading strategies before you invest. Access this tool right in your browser, or download Wealth-Lab Pro® for more robust capabilities.' Below this is an image of two computer monitors displaying stock charts. To the right of the image is a button that says 'Open a Brokerage Account'. On the left side of the page, there is a sidebar with links for 'Trading Overview', 'WHAT WE OFFER' (The Fidelity Account), 'INVESTMENTS AND SERVICES' (Investment Choices, Commissions and Margin Rates, Online Trading, Mobile Trading, Commitment to Execution Quality), 'ADVANCED TRADING' (Active Trader Solutions, Active Trader Events), 'Advanced Trading Tools and Features', and 'LEARN MORE' (Compare Online Brokers, FAQs). At the bottom of the main content area, there are two columns: 'Web-based strategy testing' (Available to all Fidelity customers, Save strategies and monitor them. Get buy and sell alerts, place trades, and review orders. Not a customer yet? Try strategy testing for free.) and 'Desktop strategy testing' (Available to customers who trade over 36 times in a rolling 12-month period, with a minimum of \$25,000 in assets. Wealth-Lab Pro® lets you customize with or without code, test multiple strategies at one time, and place trades manually or automatically.* Not eligible? Try a 30-day application trial.)

Go to: [Fidelity.com/wlp](https://www.fidelity.com/wlp)

Demonstration

This begins the demonstration portion of the seminar on Wealth-Lab Pro®

Navigating the Wealth-Lab Pro® home page

1 New charts

- Historical or real-time

2 Explore & backtest

- Pre-built strategies

3 Build & backtest

- Use drag & drop or program your own

4 Activate strategies

- Monitor all your strategies in one place

5 Manage orders

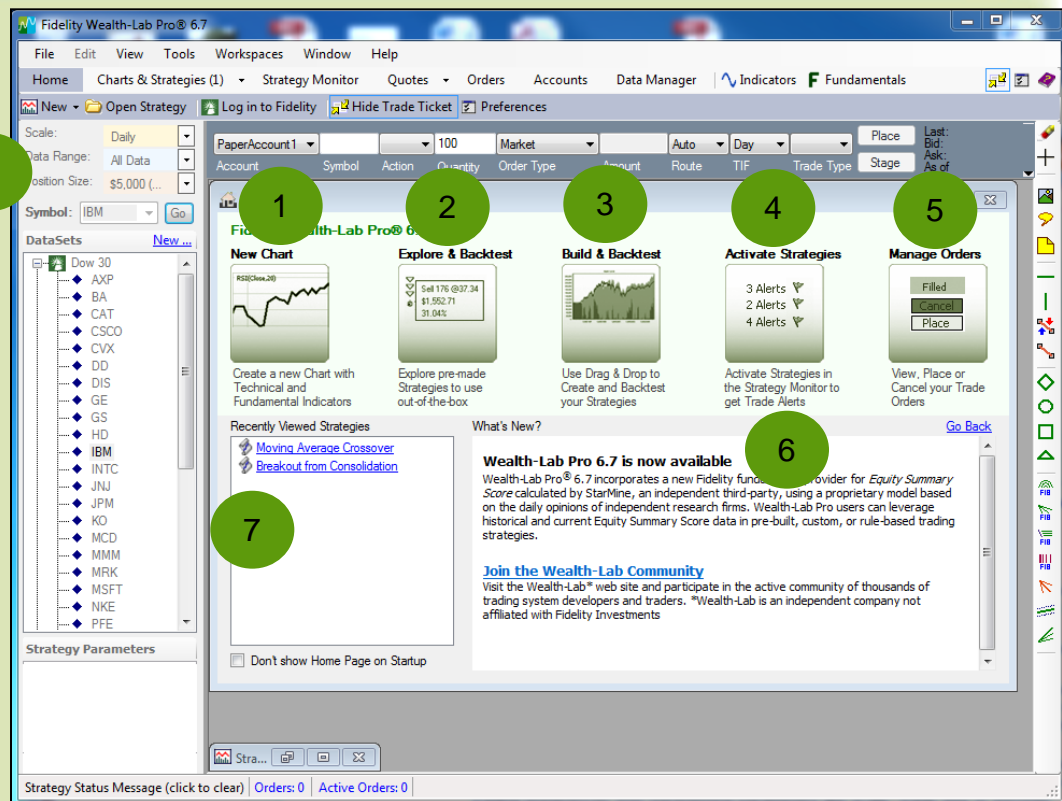
- Status for active, canceled, and executed orders

6 What's new

- Stay on top of new releases & news

7 Recently viewed strategies

- Track and easily review



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8 Data panel

- Manage data for all your tests

Using the Data Manager Tool

Getting started with the Data Manager Tool

What is it?

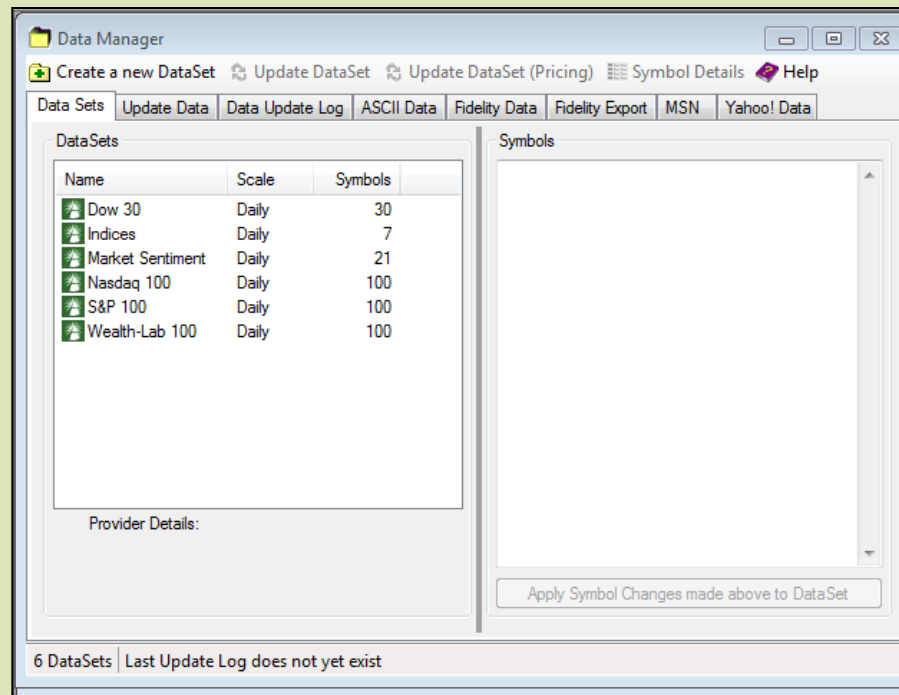
- Manages the data you need to build and test your trading strategies or to review charts

Why use it?

- Market data powers all your WLP tools - required for analysis and testing
- Easily create, manage, or update data set(s)

How do I access?

- Tools drop down menu > Data Manager, or
- Data Manager on Navigation Bar, or
- Ctrl + M



For illustrative purposes only.

Q: What is a data set?

A: A collection of symbols used to test in Wealth-Lab Pro®

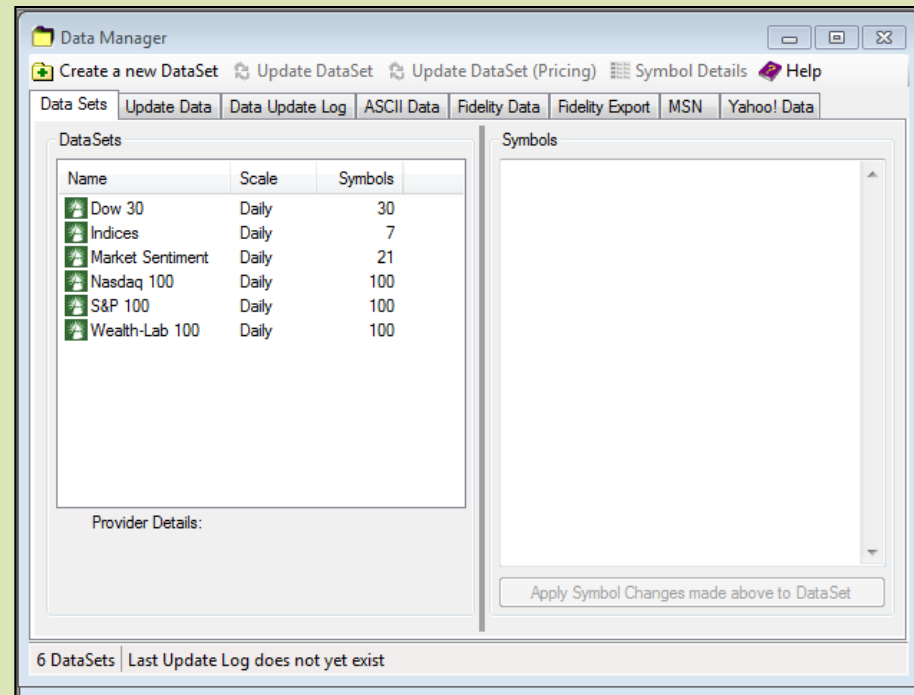
Pre-defined data sets

Benefit:

- Familiar to most investors; for example, S&P 100, Dow 30
- Already built in WLP and ready to use
- Helps streamline your workflow

Helpful Hint:

- Manage symbol changes on the “Fidelity Data” tab



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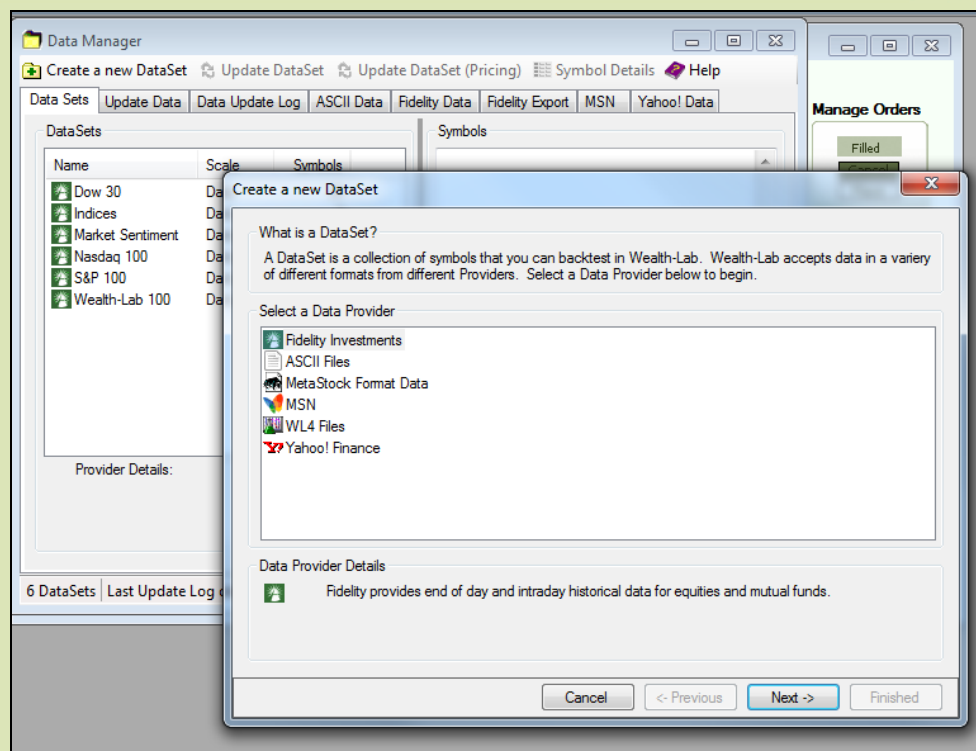
Building custom data sets

Benefit:

- Custom data sets allow you to choose the symbols for which you want to test
- Use Fidelity, third party, or specialty data

Helpful Hint:

- Create data sets using your Fidelity Watch List or Stock Screener results



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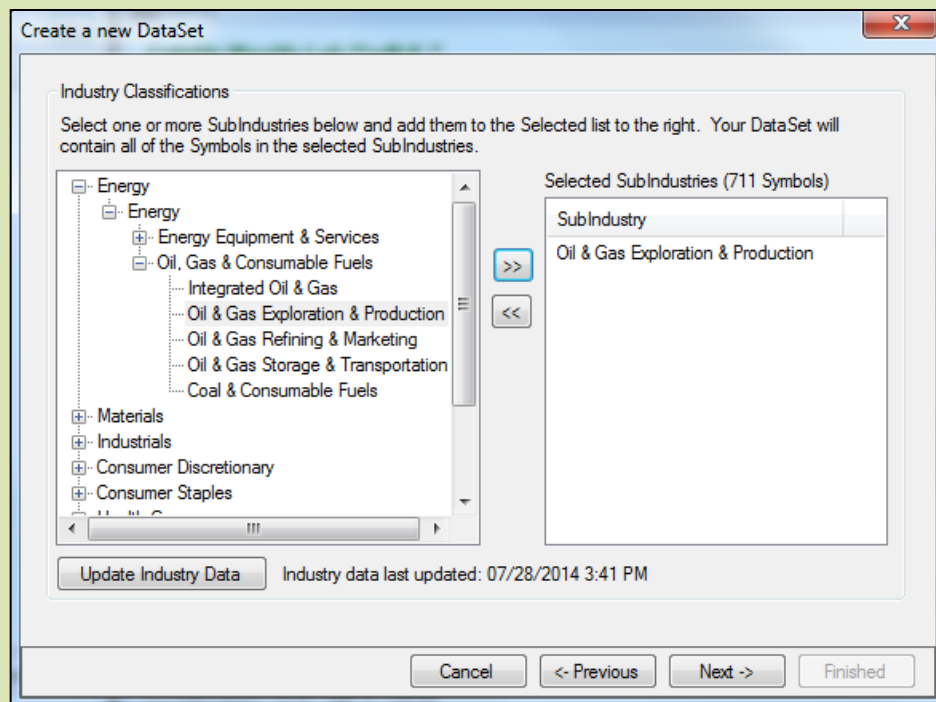
Building data sets based on industry symbol lists

Benefit:

- Ease of use for sector analysis
- Quickly populates all symbols contained in a sector or industry

Helpful Hint:

- Add several industries at once to create the data set for a large sector



For illustrative purposes only.

EOD and intraday data support

Benefit:

- Allows you to create intraday strategies

Helpful Hint:

- Receive trade alerts during the market day that help you decide if you want to take action

Create a new DataSet

Fidelity DataSet Options

How do you want to select the Symbols that will make up your DataSet?

- ☒ Enter the Symbols manually or paste them from the Clipboard
- ☐ Select the Symbols from predefined Industry Classification groups
- ☐ Import the Symbols from a Fidelity.com Watchlist (requires log in)

Scale

Select the data scale for this DataSet:

Daily
1 Minute
3 Minute
5 Minute
10 Minute
15 Minute
30 Minute

<- Previous Next -> Finished

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Historical fundamental data

What is it?

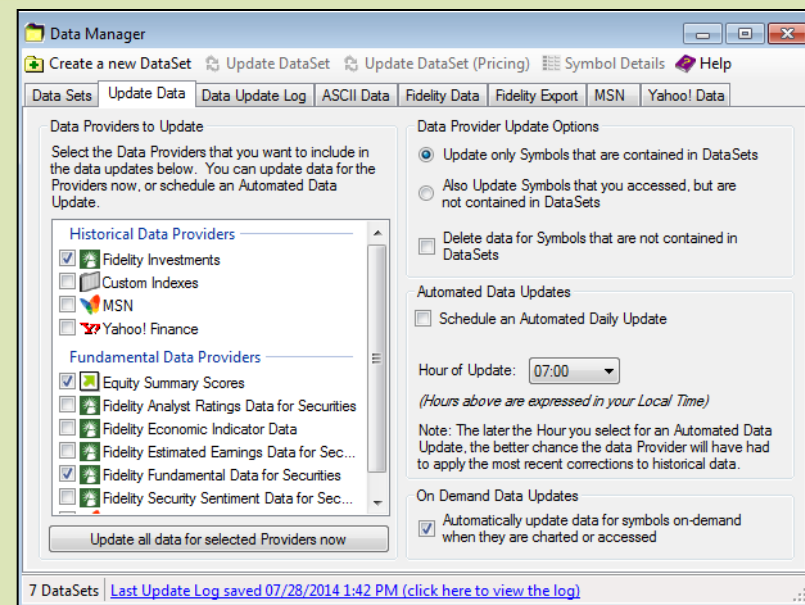
- Any data about an instrument that is not price and volume; for example, analyst upgrades and downgrades, estimated earnings, etc.

Why use it?

- Combine technical and fundamental analysis to create a more robust trading strategy

How do I access?

- Tools drop down menu > Fundamental Data Items, *or*
- F Fundamentals on Navigation Bar, *or*
- Ctrl + U



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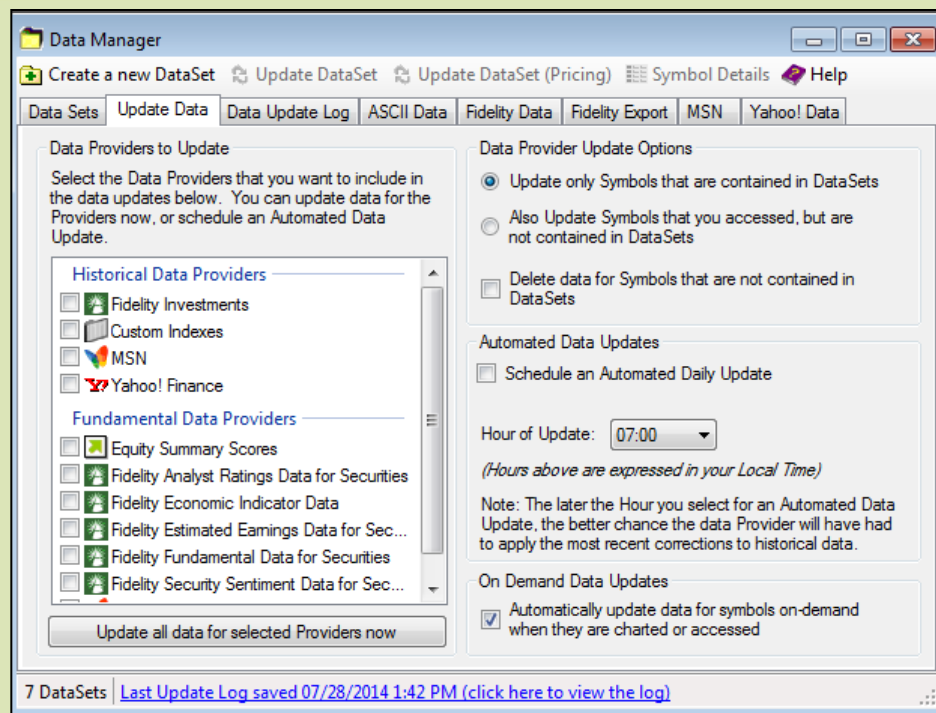
Updating your data

Benefit:

- Allows your strategy to be evaluated for trade alerts

Helpful Hint:

- Automate your data update so your analysis is complete prior to market open



For illustrative purposes only.

Charting – Data Visualization and Ideas

Charting Tool Basics

Benefit:

- Help visualize trading opportunities and verify that a strategy is working as expected

How?

- New Chart icon on Home window
- New > New Chart Window on Function Bar, *or*
- Charts & Strategies > New Chart on Navigation Bar, *or*
- Ctrl +Shift + C



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Drawing Tools

Benefit:

- Help you identify trends, potential support and resistance points, and patterns

Helpful Hint:

- Use the tradable trend line to quickly generate an alert when the trend changes



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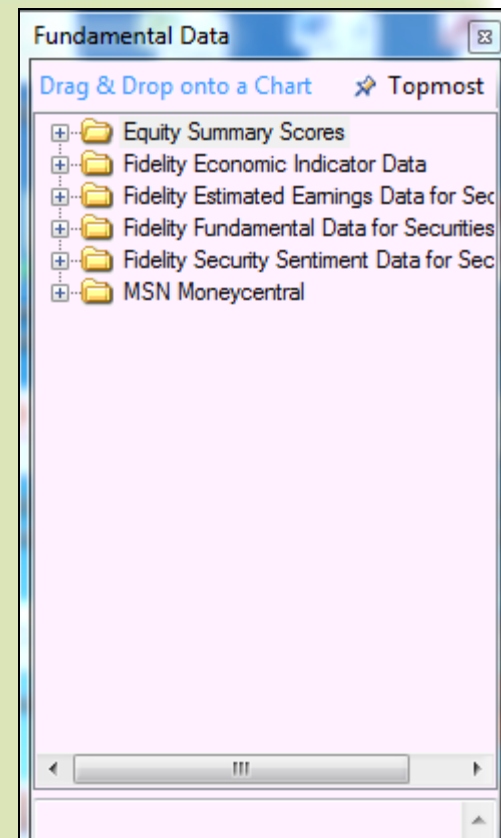
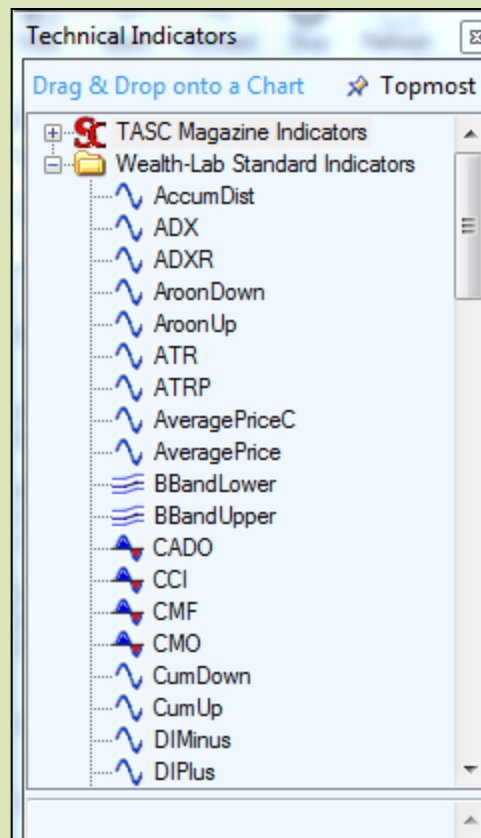
Charting indicators and fundamentals

Benefit:

- Identify correlation between changes in price and buying and selling pressure; or changes in business cycle over time

Helpful Hint:

- Download additional indicators from the Wealth-Lab Community for further analysis - <http://www.wealth-lab.com/>



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Designing and Building a Trading System

Here's how it works...

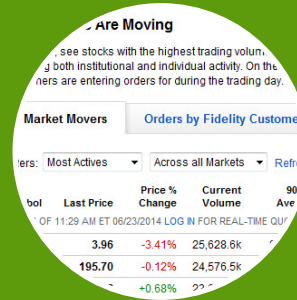
- 1 **Start with an idea**
- 2 **Test the idea**
- 3 **Perform a back test**
- 4 **Evaluate the results**
- 5 **Test the revised strategy**

You have access to even more resources



Call 800.564.0211

to speak with one of our
representatives



**Visit the Wealth-Lab Pro®
discussion forum**

for more information

<http://www.wealth-lab.com>

Tell us how we can help you today.

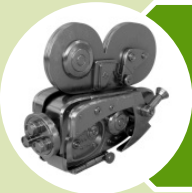
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Read Articles or Complete a Course
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For example: *Support and Resistance*



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illustrating "how to" perform certain tasks and functions
For example: *Managing positions: When to cut and run, when to take profits*



Attend Seminars/Webinars
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Automated trading poses significant additional risks. Use of Wealth-Lab Pro's automated trading feature is subject to additional terms, conditions, and eligibility requirements.

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Past performance is no guarantee of future results.