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®

For illustrative purposes only.
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
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

Go to: 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

8. **Data panel**
   - Manage data for all your tests

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Fidelity Investments
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

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

For illustrative purposes only.
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
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

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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
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

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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

For illustrative purposes only.
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/](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.
Use the Fidelity Learning Center at home to...

Go to: Fidelity.com > Research > Learning Center
to obtain more information and insight on trading and investing

Read Articles or Complete a Course
covering a variety of topics from Fidelity and multiple independent third parties
For example: Support and Resistance

Watch Videos
illustrating “how to” perform certain tasks and functions
For example: Managing positions: When to cut and run, when to take profits

Attend Seminars/Webinars
register for a seminar at your local branch office or view one of our webinars
Keep in mind that investing involves risk. The value of your investment will fluctuate over time and you may gain or lose money.

Stock markets are volatile and can fluctuate significantly in response to company, industry, political, regulatory, market, or economic developments. Investing in stock involves risks, including the loss of principal.

Any screenshots, charts, or company trading symbols mentioned, are provided for illustrative purposes only and should not be considered an offer to sell, a solicitation of an offer to buy, or a recommendation for the security.

Wealth-Lab Pro® is available to investors in households that place 36 or more stock, bond, or options trades in a rolling twelve-month period and maintain $25K in assets across their eligible Fidelity brokerage accounts.

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

The Strategy Testing and Backtesting features available on Fidelity.com or in WealthLabPro®, and any resulting trade signals generated by the strategies, are provided for educational purposes and as examples only. They should not be used or relied upon to make decisions about your individual situation. You may modify the backtesting parameters as you see fit. Fidelity is not adopting, making a recommendation for or endorsing any trading or investment strategy or particular security. The Backtesting feature provides a hypothetical calculation of how a security or portfolio of securities, would have performed over a historical time period according to the criteria in the example trading strategy. Only securities that were in existence during the historical time period and that have historical pricing data are available for use in the Backtesting feature. The feature has only a limited ability to calculate hypothetical trading commissions, and it does not account for any other fees or for tax consequences that could result from a trading strategy. You should not assume that Backtesting of a trading strategy will provide any indication of how your portfolio of securities, or a new portfolio of securities, might perform over time. You should choose your own trading strategies based on your particular objectives and risk tolerances. Be sure to review your decisions periodically to make sure they are still consistent with your goals.

Past performance is no guarantee of future results.