




# Searching for Stock Ideas on Fidelity.com

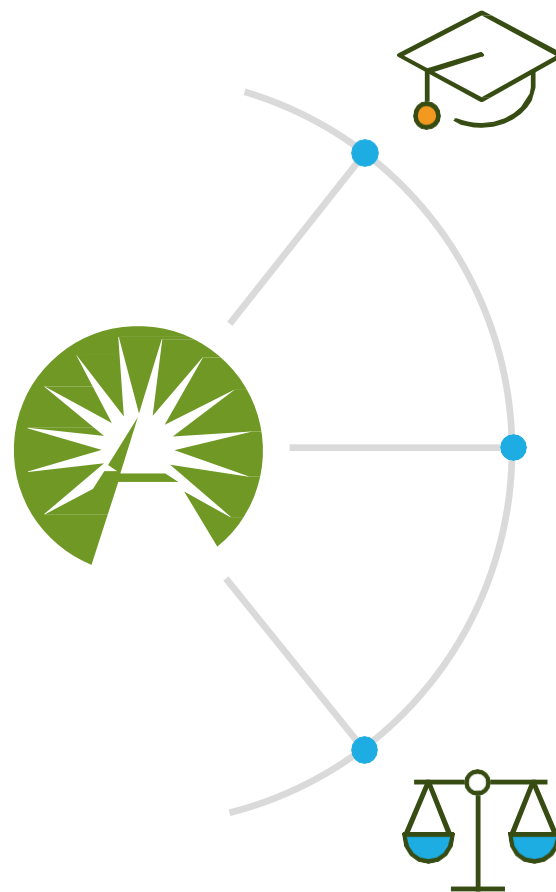


A background image showing three business professionals walking in a city. A woman with blonde hair is on the left, a man in a trench coat is in the center, and a woman with curly hair is on the right. They are all looking down at their phones. The image is overlaid with a green tint.

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By better understanding Fidelity's  
online research tools, you can make  
more confident and informed stock  
investment decisions.

# Develop an Ongoing Strategy with Fidelity



Live demonstration of  
online research tools



Mobile apps so  
you can monitor  
on-the-go



Resources for making  
more prudent and  
informed decisions



## Common Questions

**1**

Where can I find individual equity ideas?

**2**

Have you used Fidelity.com's stock screener?

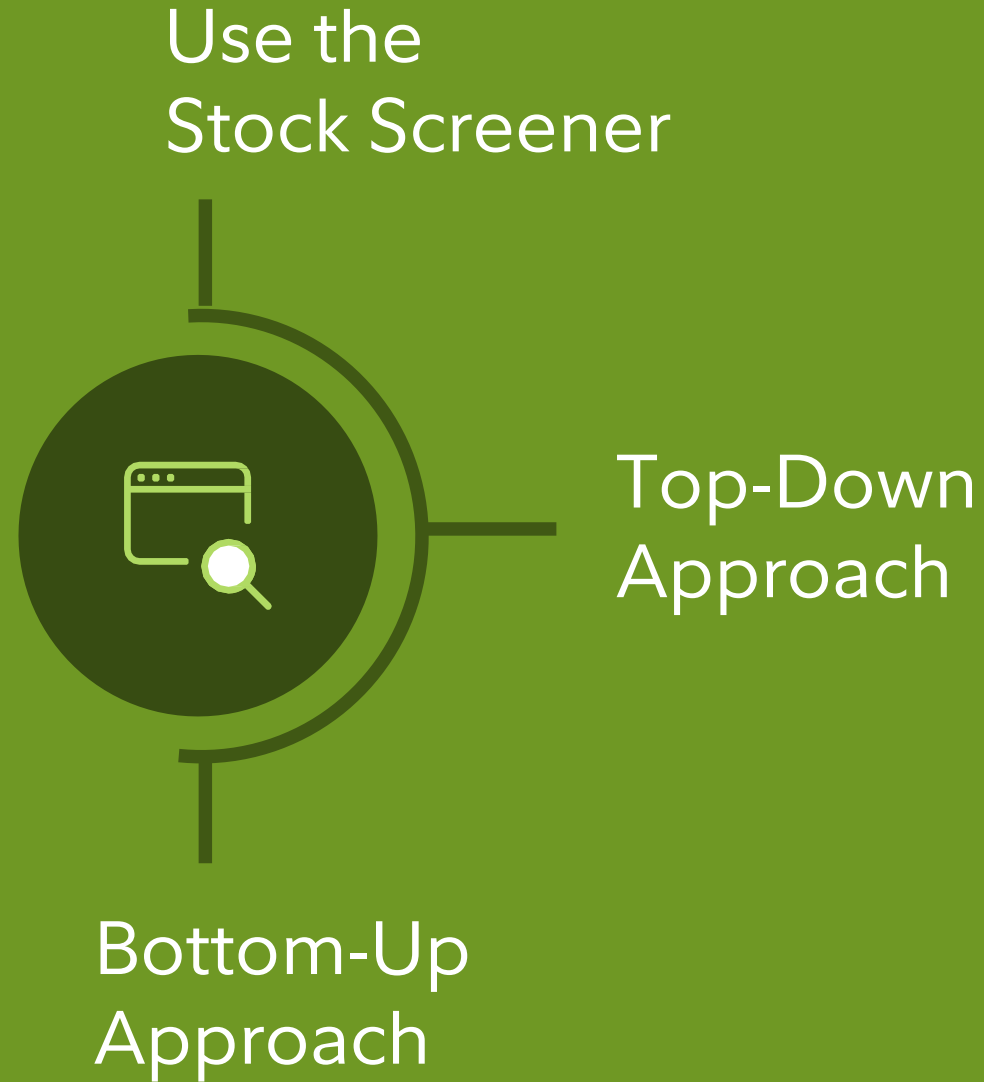
**3**

Have you used Fidelity's mobile app?



## Today's Agenda

# Finding Stocks





A great resource to help you easily match your ideas with potential investments

 [News & Research > Stock > Stock Screener](#)

7

# Top-Down Approach







# Stock Screener



Using **strategies** within this tool provides a top-down approach

The screenshot displays the Fidelity Stock Screener interface. At the top, a navigation bar includes links for Accounts & Trade, Planning & Advice, News & Research, Investment Products, and Why Fidelity. A banner at the top left introduces 'New! Introducing Themes' as a new way to start stock research. The main section is titled 'Stock Screener' and features a sidebar on the left with a list of criteria: Most Popular (11 Criteria), Basic Company Facts (11 Criteria), Dividends (8 Criteria), Earnings (8 Criteria), Company Value (10 Criteria), Company Growth (15 Criteria), Management & Growth (31 Criteria), Performance & Volatility (25 Criteria), Trading Characteristics (10 Criteria), Technicals (8 Criteria), and Analyst Opinions (22 Criteria). The main area is divided into 'Themes' and 'Strategies'. Under 'Themes', 'Growth' is highlighted with a green box. The 'Strategies' section is expanded, showing a list of 12 growth strategies, each with a brief description and a 'Learn More' link. The strategies include: Big Buys / Best Bargains, Dividend Growers, Earnings Growth, Rating Upgrades and Positive Surprises, Finding Real Surprises, Growth at a Reasonable Price (GARP), High Quality Dividend Payers, Increasing Sales and Margins, Large Cap Growth, Mid Cap Growth, No Plus Grow, Small Cap Growth, Thank you PEG, Top 20% Large Cap Growth Stocks, Top 20% Mid Cap Growth Stocks, and Top 20% Small Cap Growth Stocks. The interface is powered by Zacks Investment Research, Inc.

DJIA: 25,417.71 +92.72 (0.37%)
NASDAQ: 7,670.145 +23.121 (0.30%)
S&P 500: 2,822.64 +10.77 (0.38%) — Markets close in 6 hrs 7 mins

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**Enter Name or Symbol**



Find Symbol

## Sectors & Industries Overview

**Snapshot**

Performance

Weighting Recommendations

Business Cycle

Find Investments

### Performance

**SECTOR | INDUSTRY**

Chart Performance

Sector <small>Expand All   Collapse All</small>	Last % Change <small>AS OF 09:52 AM ET 05/14/2019</small>	Market Cap <small>05/13/2019</small>	1-Year % Change <small>05/13/2019</small>
+ Communication Services <small>5 Industries</small>	+0.04%	\$4.47T	+9.23%
+ Consumer Discretionary <small>11 Industries</small>	+0.02%	\$5.00T	+8.14%
+ Consumer Staples <small>6 Industries</small>	+0.49%	\$3.53T	+14.99%
+ Energy <small>2 Industries</small>	+0.73%	\$3.33T	-17.88%
+ Financials <small>7 Industries</small>	+0.36%	\$6.97T	-5.62%
+ Health Care <small>6 Industries</small>	+0.62%	\$5.17T	+5.10%
+ Industrials <small>14 Industries</small>	+0.32%	\$3.95T	-0.68%
+ Information Technology <small>6 Industries</small>	+0.61%	\$7.77T	+4.83%
+ Materials <small>5 Industries</small>	+0.17%	\$1.77T	-8.51%
+ Real Estate <small>2 Industries</small>	+0.29%	\$1.31T	+14.90%
+ Utilities <small>5 Industries</small>	-0.11%	\$1.36T	+16.34%
<b>S&amp;P 500 ® Index</b>	<b>+0.38%</b>	<b>--</b>	<b>+3.08%</b>

Take a guided tour of Fidelity's sector and industry research. [📺](#)

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### Understanding Sectors

The Business Cycle Approach to Sector Investing (PDF) provides details on how you can potentially take advantage of opportunities that arise due to the relative performance of sectors in each phase. FIDELITY INVESTMENTS

Learn more about sector investing in the [Fidelity Learning Center](#).

### Fidelity Insights

[Q2 2019 Quarterly Sector Update \(PDF\)](#)

[Q2 2019 Quarterly Market Update \(PDF\)](#)

[View more Fidelity Insights.](#)

# Sectors & Industries Overview

This allows you to conduct research at the sector or industry level

 [News & Research > Markets & Sectors > Sectors & Industries Overview](#)

# Sectors & Industries Overview



Sector	YTD % Change	1Y % Change	3Y % Change
Communications Services	+0.64%	\$4.47B	+9.23%
Computer & Electronic Products	+0.02%	\$6.02B	+0.58%
Consumer Services	+0.49%	\$3.03B	+14.98%
Energy	+0.73%	\$5.33B	+17.08%
Financials	+0.36%	\$4.07B	-8.63%
Health Care	+0.62%	\$6.17B	+9.58%
Industrials	+0.39%	\$3.05B	-1.08%
Information Technology	+0.81%	\$7.77B	+6.92%
Materials	+0.17%	\$1.79B	-8.91%
Real Estate	+0.29%	\$1.01B	+14.92%
Utilities	-0.11%	\$1.39B	+10.24%
S&P 500 Index	+0.08%	-	+0.08%

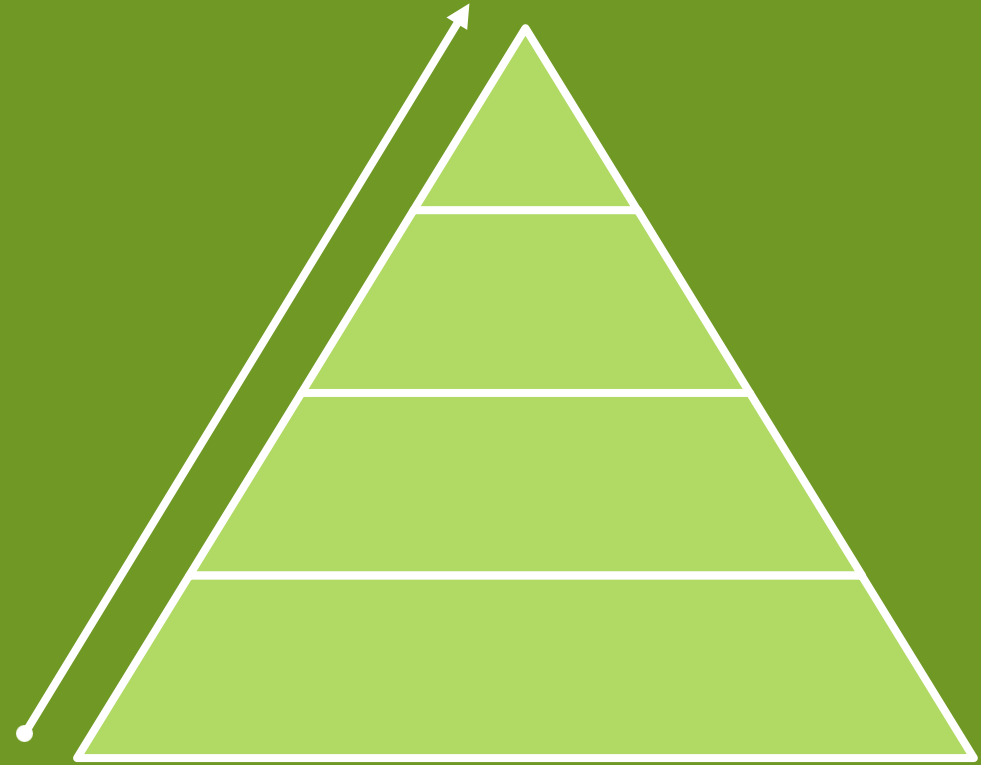
## What's unique about it?

- Use it to compare one sector to another, compare to the S&P 500 Index, and to see how underlying industries affect the overall sector performance
- Use the Business Cycle Approach to sector investing to potentially take advantage of opportunities arising from relative performance of sectors in each phase

## Where can I learn more?

- View **Take a guided tour of Fidelity's sector and industry research** from the link on the Overview page

# Bottom-Up Approach





# Stock Screener



Using **themes** within this tool provides a bottom-up approach

The screenshot displays the Fidelity Stock Screener interface. On the left, a sidebar lists various criteria categories: Most Popular (15 Criteria), Basic Company Facts (11 Criteria), Dividends (3 Criteria), Earnings (3 Criteria), Company Value (10 Criteria), Company Growth (10 Criteria), Management & Growth (31 Criteria), Performance & Volatility (25 Criteria), Trading Characteristics (10 Criteria), Technicals (3 Criteria), and Analyst Opinions (22 Criteria). The main area is titled 'Start your stock screen by applying filters to the left' and features a 'Themes' section. The 'Cloud Computing' theme is highlighted with a green box. Below the themes, a grid of icons represents different sectors: Picking Stocks with a Thematic Approach, 3D Printing (20 stocks), Artificial Intelligence (16 stocks), Big Data (40 stocks), Construction Machinery (21 stock), Utility Services (35 stocks), Drones (29 stocks), Environmental Services (14 stocks), Fintech (87 stock), Health Care Facilities (13 stocks), Health Care Technology (18 stocks), Life Sciences Tools (20 stocks), Natural Foods (11 stock), Pharmaceuticals (41 stocks), Robotics (28 stocks), and Software Services (17 stocks). A 'Cloud Computing Theme' pop-up window is open, showing a description of the theme and a list of 63 matching stocks. The pop-up includes a 'Why Cloud Computing?' section and a 'What's Included?' section. Below the pop-up, a table lists the top 10 stocks in the theme, sorted by Market Capitalization.

Action	Symbol	Company Name	Security Type	Security Price	Market Capitalization	Volume (90 Day Avg)	Sub-Industry
<input type="checkbox"/>	CRM	Salesforce.com	Common Stock	\$169.32 +0.18%	\$896.38B (Mega)	28.5M	Technology Hardware, Storage & Peripherals
<input type="checkbox"/>	GOOGL	Alphabet Inc.	Common Stock	\$1,044.57 +1.15%	\$717.52B (Mega)	1.5M	Internet Software & Services
<input type="checkbox"/>	MSFT	Microsoft Corp.	Common Stock	\$82.49 -0.35%	\$639.06B (Mega)	20.2M	Systems Software
<input type="checkbox"/>	AMZN	Amazon.com Inc.	Common Stock	\$1,159.79 +0.65%	\$555.43B (Mega)	3.5M	Internet & Direct Marketing Retail
<input type="checkbox"/>	T	AT&T Int'l.	Common Stock	\$26.17 +0.17%	\$221.69B (Mega)	31.2M	Integrated Telecommunication Services
<input type="checkbox"/>	ORCL	Oracle Corp.	Common Stock	\$46.52 +0.21%	\$201.96B (Mega)	13.8M	Systems Software
<input type="checkbox"/>	CSCO	Cisco Systems Inc.	Common Stock	\$37.40 -0.07%	\$185.22B (Mega)	20.3M	Communications Equipment
<input type="checkbox"/>	IBM	International Business Machines Corp.	Common Stock	\$163.57 -0.34%	\$142.66B (Mega)	4.4M	IT Consulting & Other Services
<input type="checkbox"/>	ADBE	Adobe Systems Inc.	Common Stock	\$174.61 +0.63%	\$85.52B (Large)	2.5M	Application Software
<input type="checkbox"/>	CRM	Salesforce.com	Common Stock	\$104.07 +1.12%	\$74.34B (Large)	4.4M	Application Software
<input type="checkbox"/>	CRM	Salesforce.com	Common Stock	\$117.22 +0.47%	\$47.11B (Large)	1.9M	Systems Software
<input type="checkbox"/>	CRM	Salesforce.com	Common Stock	\$84.65 +1.38%	\$28.63B (Large)	1.6M	IT Consulting & Other Services

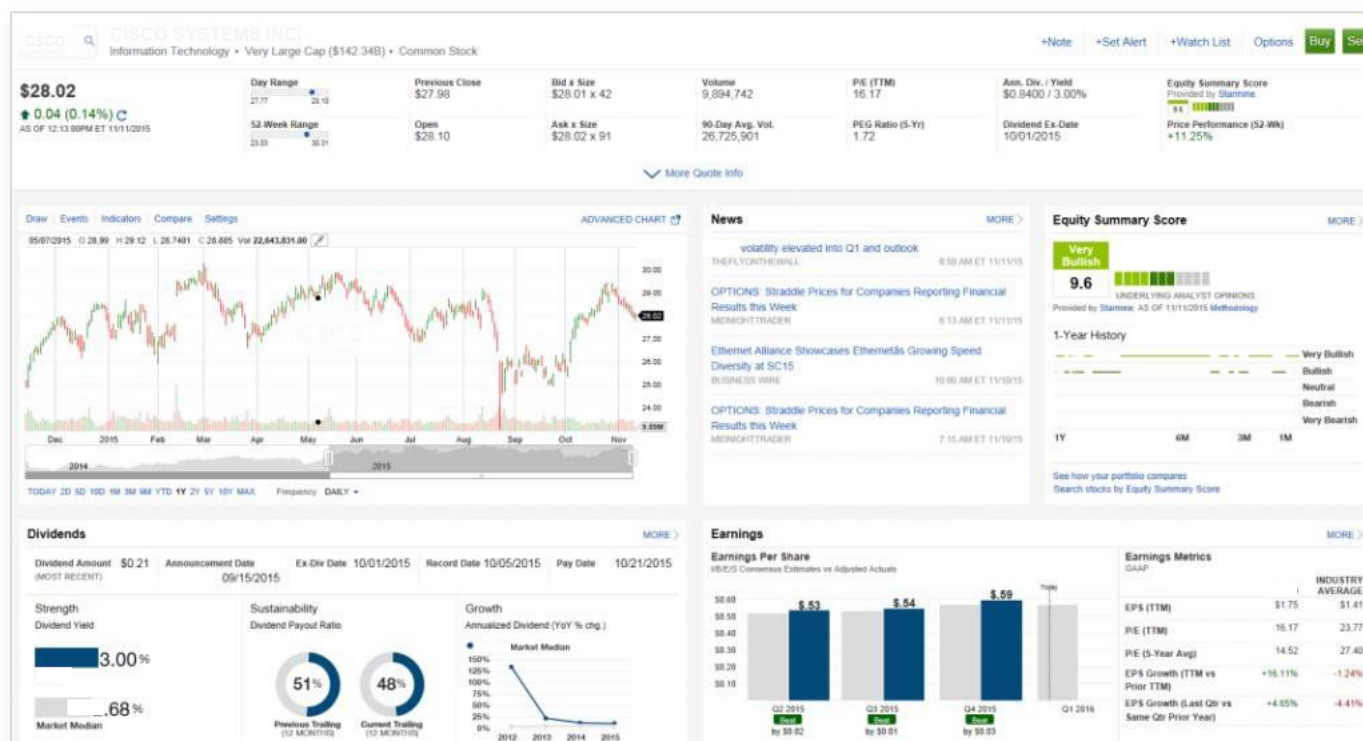
# Analyzing Stocks



Stock  
Research

Equity Summary  
Score

by StarMine by Refinitiv



# Stock Research Experience

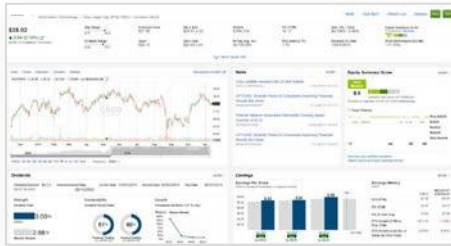
A snapshot of the selected stock

 News & Research > Stocks:  
Enter a symbol, select Snapshot

Screenshot is for illustrative purposes only.



# Stock Research Experience



## What's unique about it?

- Provides a dashboard for you to easily access everything you need to help make investment decisions in one place
- Displays quotes, news, dividends, earnings, company profile, and the Equity Summary Score by StarMine by Refinitiv—all on one page
- Provides Fundamental Analysis and Recognia Technical Analysis to save time on research and provide an overall assessment of a company's valuation, quality, growth stability, and financial health
- Review Social Sentiment and Top Competitors information for a selected security

## Where can I learn more?

- Visit the Fidelity Learning Center to learn about Fundamental Analysis

## Equity Summary Score

[MORE >](#)

**Bullish**

**8.8**

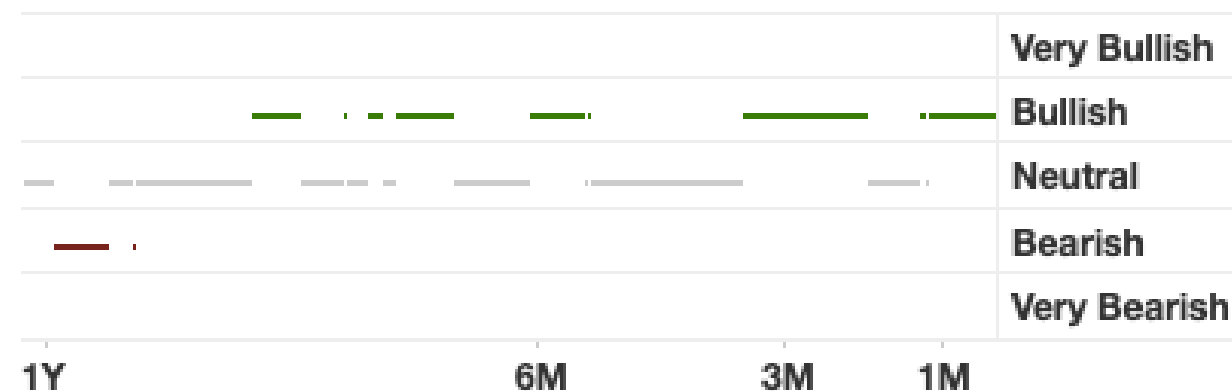
UNDERLYING ANALYST OPINIONS



PROVIDED BY [STARMINE BY REFINITIV](#)

AS OF 05/22/2019 [Methodology](#)

### 1-Year History



[See how your portfolio compares](#)

[Search stocks by Equity Summary Score](#)

# Equity Summary Score

by StarMine by Refinitiv

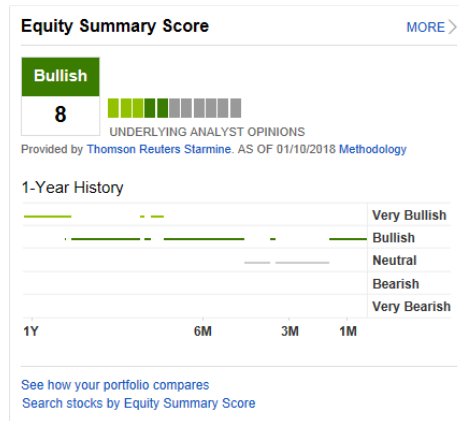
A single stock rating based on third-party analyst opinions



[News & Research > Stocks > Enter Company or Symbol](#)

Screenshot is for illustrative purposes only.

# Equity Summary Score

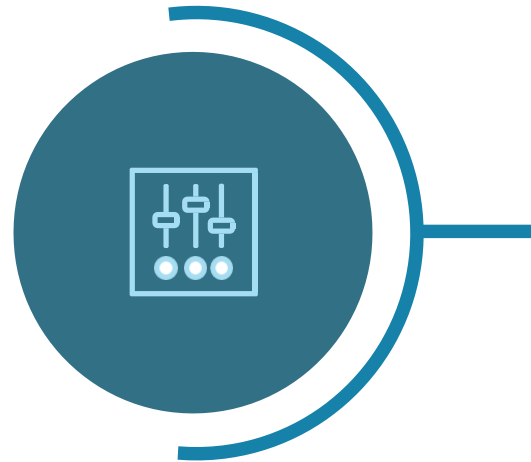


## What's unique about it?

- In conjunction with other criteria, screen stocks to help identify those you may want to include or exclude from further analysis
- Monitor the consolidated opinion of the independent research providers that are following the stocks currently in your portfolio

## Where can I learn more?

- View **Power your stock analysis with the Equity Summary Score from StarMine by Refinitiv** from the Fidelity Learning Center



Accounts & Trade | Planning & Advice | News & Research | Investment Products | Why Fidelity

Home » Research » Watch List [Back to classic view](#) [Quick Tips](#) [Feedback](#) [About](#)

Watch List: New

[Symbols](#)
[Edit](#)
[Columns](#)
[Positions](#)
[Export](#)
Streaming: ON Refresh

Symbol	Name	Yield	Last Price	Chg	% Chg	Bid	Ask	52-Week Range	Qty	Purchase Price
		1.47	172.51	+0.81	+0.47	172.51	172.52	114.76 - 176.24		
	CORPORATION	1.64	29.2819	-0.0381	-0.13	29.28	29.29	21.77 - 29.50		
	ND CO	2.12	106.31	-0.54	-0.51	106.31	106.32	81.635 - 108.40		
	OMPANY	2.65	60.23	-0.10	-0.17	60.22	60.23	49.27 - 60.56		
		1.68	75.99	-0.16	-0.21	75.99	76.00	55.23 - 77.92		

[Buy](#)
[Sell](#)

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AS OF 12/13/2017 1:45:02 PM ET

[Symbol](#) [Trade](#)

[DJIA 24,597.36 +92.56 \(+0.38%\)](#)
[NASDAQ 6,875.58 +13.27 \(+0.19%\)](#)
[S&P 500 2,665.62 +1.51 \(+0.06%\)](#)
AS OF 12/13/2017 1:44 PM ET
[Hide](#)

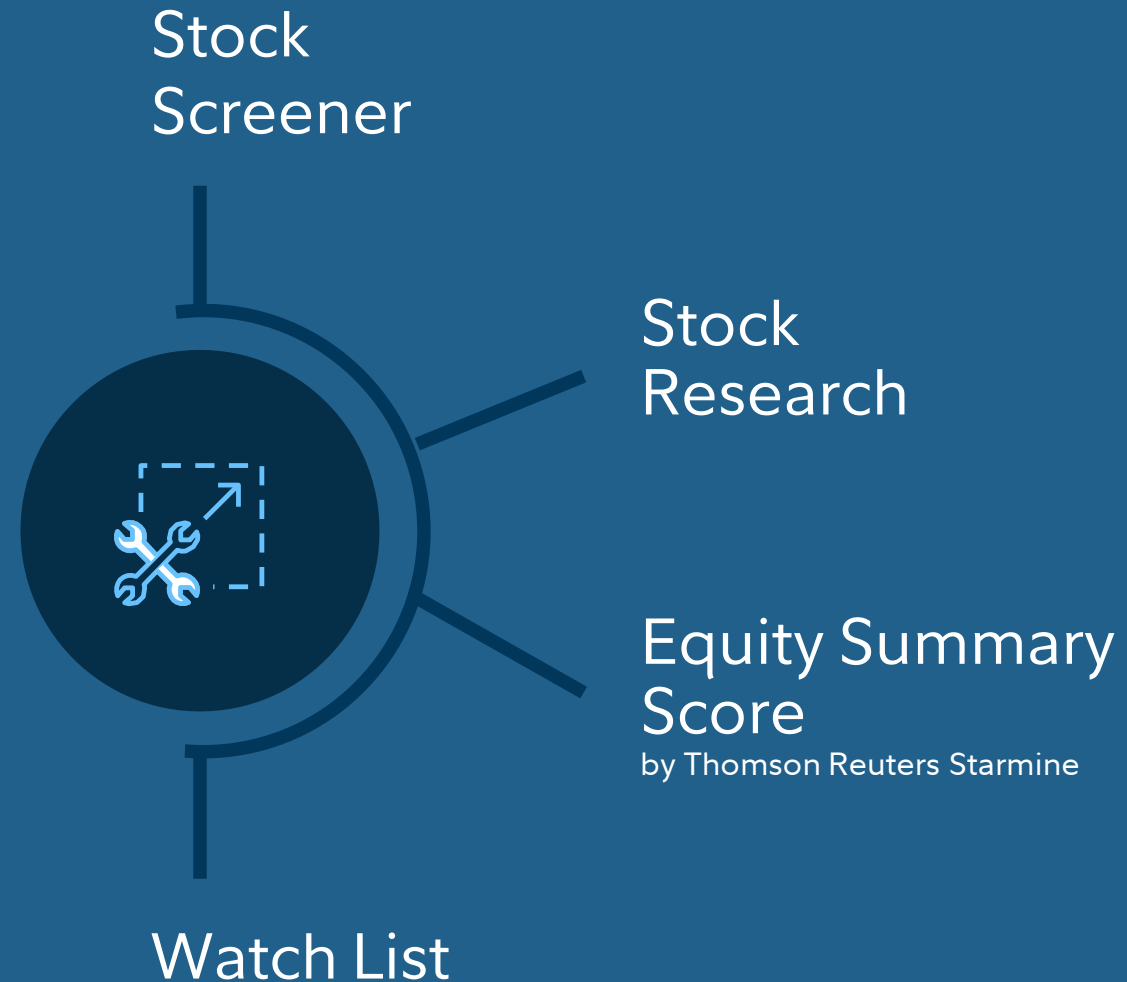
# Watch List

An interactive tool that allows you to monitor and customize the securities you own, or the securities on your radar

 [News & Research > Watch List](#)

Screenshot is for illustrative purposes only.

# Demonstrations of Tools





## In Review





## Access your accounts whenever and wherever you want

- View Stock Screener from any device, anytime
- Use MyScreens to access your custom screens on-the-go
- View Stock Research experience across multiple devices

## Mobile Platform Highlights\*

- Track your portfolio
- Pay bills
- Research and news
- Investor Center locator
- Trade anytime, anywhere
- Workplace accounts
- Remote check deposit
- IRA contributions

\* Not all features are available on all platforms. For a list of available features please visit the mobile details page for your specific device.

# Next Steps



**Review  
materials in  
your kit**

**Read the Fidelity Viewpoints article:**

- *Guide to Trading*

**Attend Additional Seminars:**

- New to ETFs? 5 Must-ask Questions to Get Started
- Fidelity's Research and Trading Tools
- Understanding Sector Investing

# Tools to Assist You

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## Fidelity Learning Center

 [Fidelity.com/learning-center](https://www.fidelity.com/learning-center)

- Take a course
- Get more information
- Watch videos
- Attend seminars/webinars

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## Fidelity.com

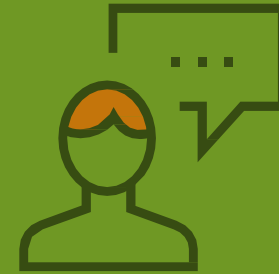
 [Fidelity.com/stocks](https://www.fidelity.com/stocks)

- Stock Screener
- Sectors & Industries Overview
- Equity Summary Score
- Watch List





# How Fidelity Can Help



Meet with  
a Fidelity  
advisor

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Better understand how to use our  
research and trading tools

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Further utilize the Fidelity trading  
platform

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Create a more effective, overall  
trading strategy

A man in a dark suit and blue tie is sitting and holding a tablet, looking at it and talking to a man and a woman. The man is wearing a plaid shirt and the woman is wearing a brown sweater. They are all smiling and looking at the tablet. The background is a blurred office or home setting. The entire image has a green tint.

# The Advantage of Working with Us

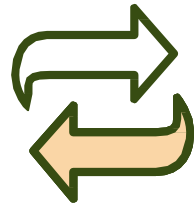
# Why Fidelity



## WE BELIEVE IN MAKING THE COMPLEX, SIMPLER



Planning  
and Advice



Trading



Straightforward  
Pricing




Expert Insights  
and Investing  
Tools



Security and  
Privacy



A background image showing three business professionals walking in a city. A woman with blonde hair is on the left, a man in a trench coat is in the center, and a woman with curly hair is on the right. They are all looking down at their phones. The image is overlaid with a green tint.

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# Disclosures



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.

System availability and response times may be subject to market conditions.

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.

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# Disclosures



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