1. Create Your Trading Strategy

5 STEP TRADING PLAN
Is this you?

- Opened a Brokerage account
- Placed at least 1 trade
- Interested in learning an approach to confidently trade more

Need to open a Brokerage account? fidelity.com/trading
5 Steps to Develop a Trading Plan

1. Create Strategy
2. Find Ideas
3. Prepare for a Trade
4. Place a Trade
5. Monitor Post-Trade
Getting into a Trader’s Mindset

What’s the difference between trading and investing?

A key difference is time:

Trading
Use shorter-term strategies for a short or long-term goal

Investing
Use for a longer-term goal, like retirement, or potentially build wealth
Why is a Trading Strategy Important?

Reduces the impact of emotions and loss aversion from getting in the way

Having a strategy can help you:
- Define rules to bring discipline to your trading
- Understand your risk
- Align your goals over different time horizons
Creating Your Own Trading Strategy

Capture the **rules** you set for yourself and stick to them

**Consider:**
- Set realistic profit targets
- Determine a risk level for your portfolio
- Know what you’re trading and why
- Track your progress
Try it at home

Create your trading strategy:

- How much money do I want to trade with?
- How much money am I trying to gain?
- How much money am I willing to lose?
- Am I trading for a short or long-term goal?
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