



Searching for Stock Ideas on Fidelity.com



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?

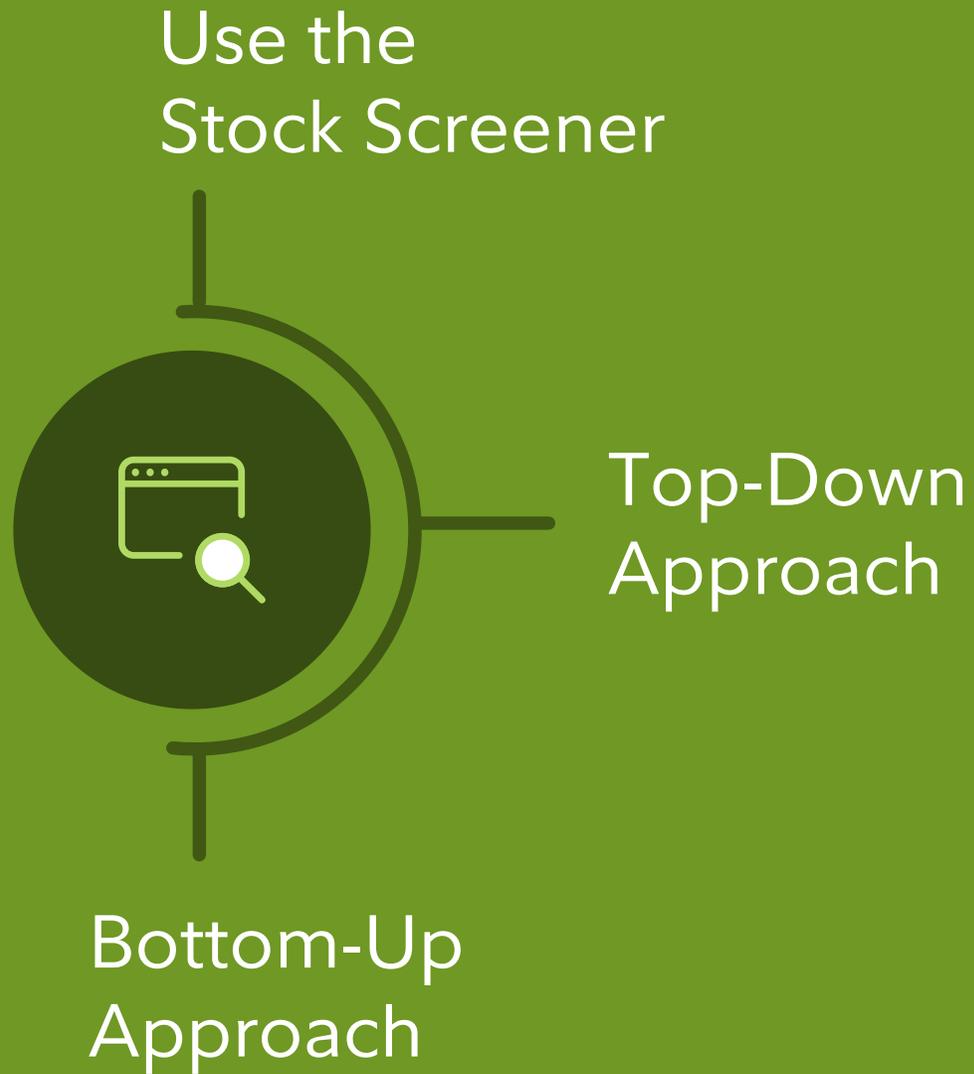
3

Have you used Fidelity's mobile app?



Today's Agenda

Finding Stocks



Stock Screener

My Screens | Feedback

Criteria < Hide

No criteria applied
Start a new screen by selecting criteria below.

ADD CRITERIA:

Search Criteria... OR [View All](#)

Most Popular (15 Criteria)
Represents the most popular criteria used on the Fidelity.com Stock Screener last month.

- Security Price
- Market Capitalization
- Security Type
- Sector/Industry/Sub-Industry
- Dividend Yield
- Equity Summary Score from Thomson Reuters StarMine
- % Price Change Today
- Volume (90 Day Avg)
- Price Performance (5 Days)
- P/E (Price/TTM Earnings)
- PEG Ratio
- Price Performance (4 Weeks)

Start your stock screen by applying filters to the left

OR

Strategies | **Themes**

Themes offer another way to start your stock research process. These themes have been identified as areas that may be of interest to our customers and have not been selected based on their investment potential. Companies within themes have varying levels of exposure to the theme, ranging from research and development to generating revenue. Themes include companies that vary in size and type, including growth stocks, which are subject to certain risks and may not be appropriate for all investors. Themes are provided by independent companies not affiliated with Fidelity and the views and values reflected therein may not be reflective of Fidelity's views. [More about risks.](#)

| | | | |
|--|--|---|--|
| Picking stocks with a thematic approach | 3-D Printing 22 stocks | Artificial Intelligence 68 stocks | Big Data 48 stocks |
| Cloud Computing 67 stocks | Construction Machinery 20 stocks | Data Services 39 stocks | Drones 32 stocks |
| Environmental Services 16 stocks | FinTech 52 stocks | Founder Run 98 stocks | Health Care Facilities 14 stocks |

Use the Stock Screener

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

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

Screenshot is for illustrative purposes only.

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, there are navigation tabs: Accounts & Trade, Planning & Advice, News & Research, Investment Products, and Why Fidelity. A notification banner at the top left reads: "New! Introducing Themes (beta) - a new way to start your stock research process. This is in addition to all of the great features you're used to including predefined screens available under Strategies. Watch the video to learn more." Below this is the "Stock Screener" header with "My Screens" and "Feedback" links.

The main content area is divided into two sections: "Themes" and "Strategies". Under "Themes", there are three options: "Most Popular" (represented by a trophy icon), "Growth" (represented by a plant icon and highlighted with a green box), and "Growth/Value" (represented by a lightbulb icon). A note states: "Investment strategies organized by style have been developed by third-party research." Under "Strategies", there is a "Criteria" sidebar on the left with a search bar and a list of criteria categories: Most Popular (15 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 under "Strategies" shows a "Growth" strategy description: "Independent expert screens that focus on companies with above average rates of growth in earnings and sales. These stocks tend to have above-market price-to-earnings and price-to-sales ratios, as the rapidly growing sales and earnings justifies a higher-than-average valuation. Growth stocks are typically focused on generating capital gains rather than income. Growth may not always be realized. Price-to-earnings or price-to-book ratios may decline due to unforeseen events. [Learn More](#)". Below the description is a grid of 16 strategy cards, each with a title, a plant icon, and a "Powered by" attribution. The cards 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".

Enter Name or Symbol

 Find Symbol

Markets & Sectors

- Overview
- Markets**
 - U.S. Markets
 - U.S. Economic Calendar
- Global Markets
 - Americas
 - EMEA
 - Asia-Pacific
 - Global Economic Calendar
- U.S. Sectors & Industries**
 - Sectors & Industries Overview**
- News & Reports
 - U.S. Markets
 - Global Markets
 - Reports Search

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

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>8 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% |
| S&P 500 © Index | +0.38% | -- | +3.08% |

Take a guided tour of Fidelity's sector and industry research.

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)

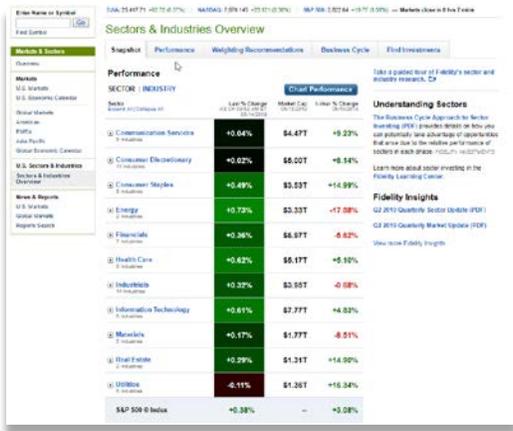
View more Fidelity Insights.

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



The screenshot shows the 'Sectors & Industries Overview' page on Fidelity's website. It features a table of sector performance metrics, including a 'YTD % Change' column with green and red indicators, and a 'Market Cap' column. The sectors listed include Communications Services, Consumer Electronics, Consumer Staples, Energy, Financials, Health Care, Industrials, Information Technology, Materials, Real Estate, and Utilities. The S&P 500 Index is also included at the bottom of the table.

| Sector | YTD % Change | Market Cap | YTD % Change |
|-------------------------|--------------|------------|--------------|
| Communications Services | +0.84% | \$4,477 | +9.22% |
| Consumer Electronics | +0.02% | \$6,007 | +5.54% |
| Consumer Staples | +0.49% | \$3,037 | +14.99% |
| Energy | +0.73% | \$3,337 | +7.08% |
| Financials | +0.36% | \$6,977 | -5.82% |
| Health Care | +0.82% | \$6,177 | +5.90% |
| Industrials | +0.32% | \$3,507 | -0.08% |
| Information Technology | +0.81% | \$7,777 | +4.02% |
| Materials | +0.17% | \$1,777 | -8.51% |
| Real Estate | +0.59% | \$1,287 | +14.90% |
| Utilities | -0.11% | \$1,287 | +16.34% |
| S&P 500 Index | +0.38% | --- | +3.08% |

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



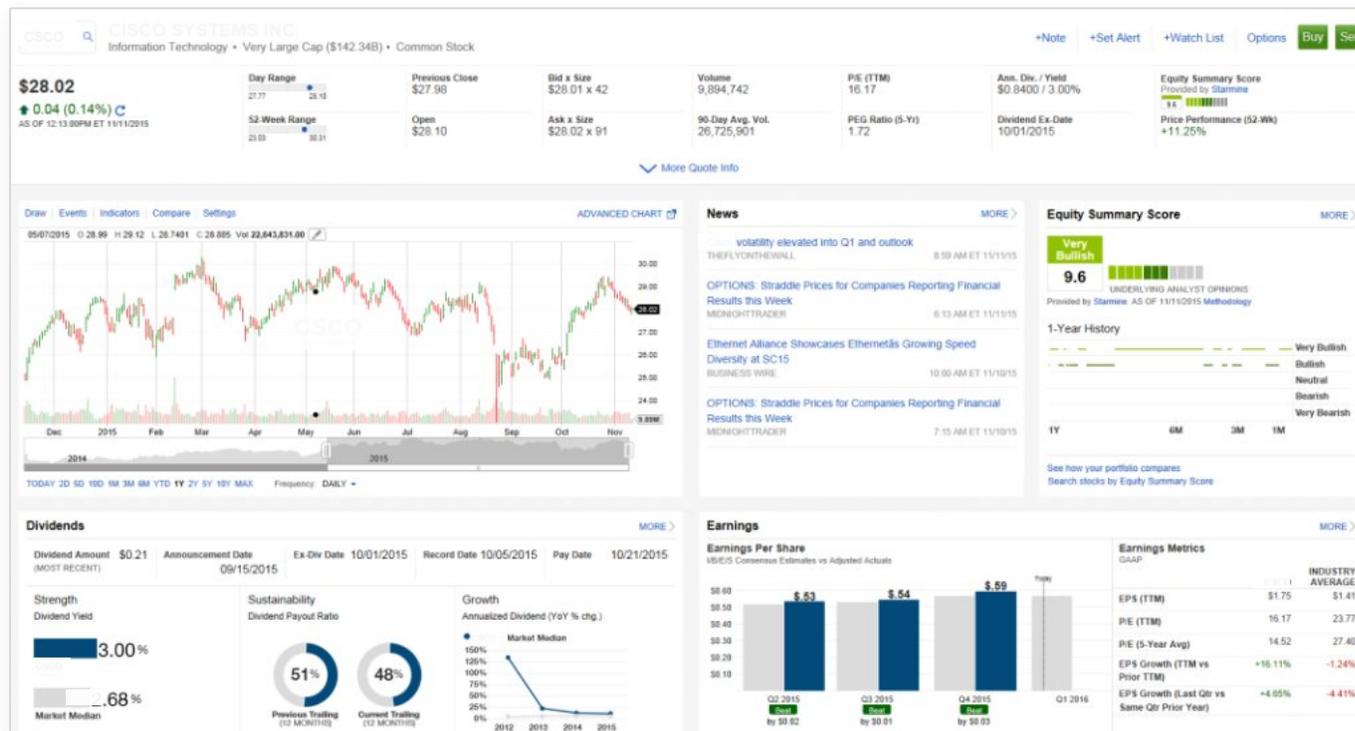
Analyzing Stocks



Stock
Research

Equity Summary
Score

by StarMine by Refinitiv



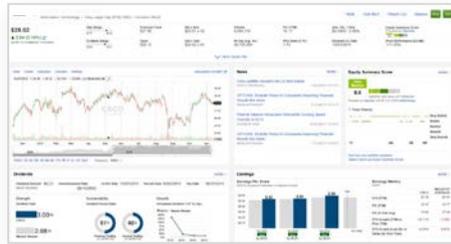
Stock Research Experience

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

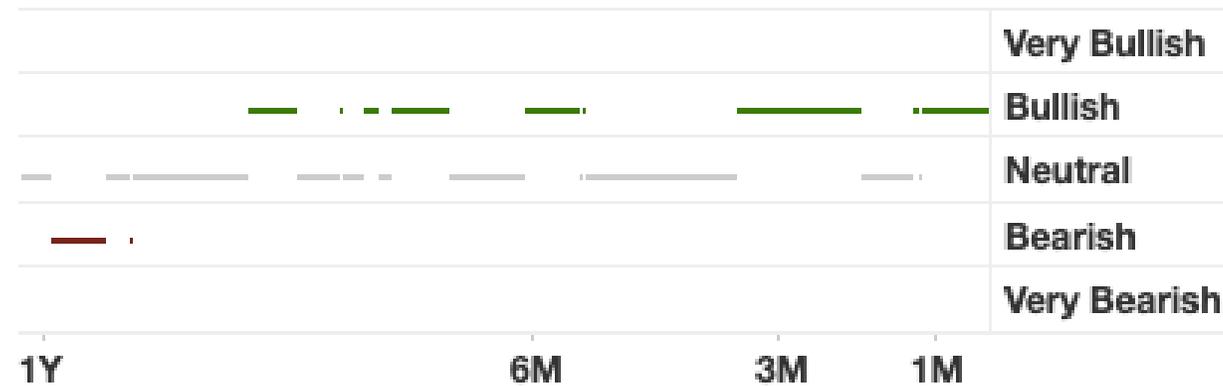
UNDERLYING ANALYST OPINIONS



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

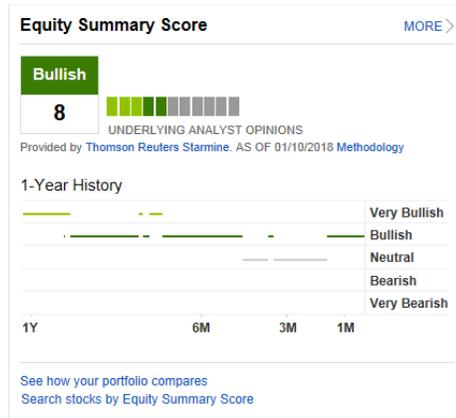
by StarMine by Refinitiv

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



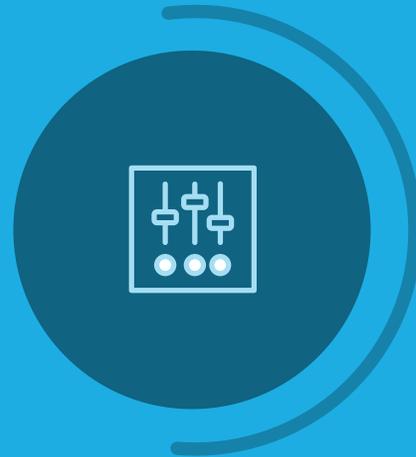
What's unique about it?

- 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

Monitoring Stocks



Using the Watch List

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

Home » Research » Watch List Back to classic view | ? Quick Tips | Feedback | About

Watch List: + 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 | | |
| BAC | CORPORATION | 1.64 | 29.2819 | -0.0381 | -0.13 | 29.28 | 29.29 | 21.77 - 29.50 | | |
| JPM | ND CO | 2.12 | 106.31 | -0.54 | -0.51 | 106.31 | 106.32 | 81.635 - 108.40 | | |
| WFC | OMPANY | 2.65 | 60.23 | -0.10 | -0.17 | 60.22 | 60.23 | 49.27 - 60.56 | | |
| C | | 1.68 | 75.99 | -0.16 | -0.21 | 75.99 | 76.00 | 55.23 - 77.92 | | |

Buy

Sell

🔔 Set Alert

📊 Chart

📄 Research

📊 Option Chain

📰 News

✕ Remove

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

Fidelity Learning Center

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

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

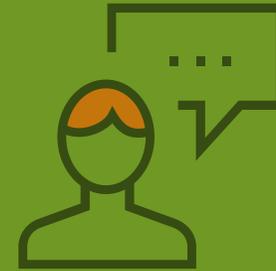
Fidelity.com

[🔗 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

Better understand how to use our
research and trading tools

Further utilize the Fidelity trading
platform

Create a more effective, overall
trading strategy

A man in a dark suit and blue tie is sitting on a couch, holding a tablet and looking towards a man and a woman. The man and woman are sitting next to him, looking at the tablet. The woman is on the left, wearing a brown sweater, and the man is in the middle, wearing a plaid shirt. The background is a blurred office or living room setting. The entire image has a green tint.

The Advantage of Working with Us

Why Fidelity



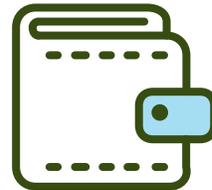
WE BELIEVE IN MAKING THE COMPLEX, SIMPLER



Planning
and Advice



Trading



Straightforward
Pricing



Expert Insights
and Investing
Tools



Security and
Privacy

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

Disclosures



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

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Disclosures



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