

## TRANSCRIPT

# Searching for something new? Use Active Trader Pro to find trade ideas

*Presenters: Peter Janssen and Jonathan Lord*

**Peter Janssen:** Thanks for that Trey and welcome, everyone. Thank you for attending here today, once again spending a little bit of time this morning with us. It's always a pleasure when we get an opportunity to discuss Active Trader Pro, which of course is Fidelity's trading platform, and really demonstrate some of what it offers in hopes of you all being able to take advantage of some of the capabilities, at least in some form or fashion, and incorporate them in your own unique trading plan and style. And that's what I really want to emphasize here. Whenever we spend time on a filter or a tool, anything that sends us signals, I always want to encourage folks to take a step back from the specific examples that we provide and really focus on the functionality -- how those tools are used and can be applied to your own situation, so definitely keep that in mind. Now, as Trey said, of course, my name is Peter Janssen, and joining me is Jonathan Lord. We are both members of the trading strategy desk here at Fidelity. And if you're joining us today and have not heard of our team up to this point, really know that our strategy desk is a strong team of traders that are dedicated towards your education. We teach on all aspects of trading to assist self-directed investors, or really anyone for that matter, who's

looking to further their knowledge, so that is for beginners looking to build a strong foundation, all the way up to advanced traders that want to dig a bit deeper into different types of strategies or analytic tools that we offer on a more regular basis. Now, of course, having that said, regardless of where you think you fall on the spectrum with your background and experience, know that our goal is to help shore up the understanding that you currently have, and then grow your knowledge moving forward. And we do that, primarily, a number of ways; through our coaching sessions that are smaller-scale webinars, much like today's presentation, that can be found on Fidelity's learning center or under [Fidelity.com/coaching](https://www.fidelity.com/coaching). We also run introductory four-week courses on a number of topics monthly at [Fidelity.com/classrooms](https://www.fidelity.com/classrooms), in addition to other types of seasonal events. We also do provide morning and afternoon market briefings for those of you that really want to stay in tune with what the markets could be doing on a daily basis or what might be driving them. That's something I definitely encourage everyone to tune into from time to time. I also want to quickly mention that we will be hosting a follow-up Q&A session for today's presentation, which will be hosted tomorrow at 2:30 Eastern Time. Jonathan and I will look to save some time towards the end of today's presentation to address some questions that are coming in, of course, but given the time constraints, we will not be able to get to them all. So, that additional hour tomorrow will certainly be valuable for those of you that

maybe want to follow up and use the tool, and sleep on it, and then follow up with questions, then again, tomorrow afternoon. Which does bring us back, of course, to today's agenda and what we'll be getting into, really focuses on finding and analyzing trade ideas within Active Trader Pro. For those of you that have Active Trader Pro already on your screen, that's perfect. Feel free to follow along. For those of you that might not; not to worry, of course. We will be sharing our screens, demonstrating full through, just as Trey said, essentially acting as your tour guide for now. Having that said, I would encourage everyone to download the program at some point in time. I really feel like it has a tremendous amount to offer, even for those of you that might not consider yourself "traders" or "active traders" but want a customizable way to view information, maybe monitor your positions, your watchlists. You name it. There's a number of benefits that it provides. So that's what we've got this screen here in the background, which is on Fidelity's website. This page that I've actually launched to can be found here towards the top left-hand corner, under "Accounts & Trade" on the green background. I've clicked on this fourth link downward, under "Active Trader Pro," which has launched this page here. In order to download it for your Mac or PC, all that you need to do here is click on this button in order to go ahead and get Active Trader Pro. Doesn't take but a few minutes, and I certainly think that everyone would benefit from that. So, with all that being said, Jonathan, I am going to really

turn it over to you, allow you to introduce yourself for a moment or two, share some of your thoughts, and then really get us started with today's material.

**Jonathan Lord:** Yeah, absolutely. Good to see you there, Peter. Thanks again, Trey, for the introduction. Ready to get started. Me and you, Peter, sat next to each other for many, many years talking directly to the clients about this program, helping people out with their trading, so, glad to get to do this as a group session here, and a lot of clients -- a lot of people that are very new to this program here today, so we welcome you. Glad you're here to learn a little bit more about this program. Going to go ahead and get started here, again, hopefully you guys have downloaded Active Trader Pro. We're going to be talking about what -- maybe some tools for finding ideas on this program. There are many ways to find ideas through Fidelity. Of course, this is just one of those. I do want to get started, as well, with a quote I was reading not long ago from Peter Lynch, a Fidelity acolyte you may be familiar with, so he says, "I always thought if you looked at 10 companies, you'd find one that's interesting. If you looked at 20, you'd find two. Or if you looked at 100, you'll find 10. The person that turns over the most rocks wins this game." And that's what're going to be talking about today, is turning over rocks. Forgive me, I will use this analogy, I will bang it home as many times as possible here, but we are going to be looking at and turning over these rocks in the marketplace,

utilizing a couple tools, and then focusing on ways to trade or find ideas and then implement those ideas; how would you do that, how would you track them. So, right now, we're going to start with something I've built here with Active Trader Pro. I do want to emphasize here early on, as well, this is for active traders. It's called Active Trader Pro. We do have other programs on Fidelity.com, where you can use our screeners to look for fundamental data, as well as technical data, for more longer-term information as well. This is going to be an absolute snapshot of the day's price action, in some cases, maybe a few days prior will be accumulated to get these. So, these alerts are going to be coming through. They're going to be streaming. They are going to be fast. It is just saying, "Today, what are the most active stocks in the universe of all markets? What is the highest volume?" That is all that this tool is going to be starting with. So, keep that in mind as we're looking through this. If this isn't your style of trading, keep in mind, utilizing some of this information might be how you find the start of a new trend, or maybe you find a stock, again, that is in an uptrend or has that look that you're looking for right along the way. So, keep that in mind. Just because you are not a day trader or a swing trader doesn't mean that this isn't for you, but if you are one of those, I think you'll like what you're going to find here shortly. So what you'll see here is, again, the Filters page is already built in here. I will show you how to get there. Of course, Quotes & Watch List would be the click, and then Filters -- we don't

want to have to rebuild this whole page for you, so go ahead and hit Filters, and that will launch in here. I also have, of course, the chart that is built up, so we can see a little bit more information going from in the past. I have a three-month daily chart currently loaded up here. So, I also have the link here to these gray tools, this is the default. There's a reason for that, and I'll come back around to it, but linking to gray tools is going to help us out immensely in this instance here. And then I also have some information about the position, so you can also link this, and this page here, this is the profile about that position. That is under News & Research, and then, Stock ETF Profile. Why do I do this? Well, one's for screening here. Again, there's a lot of rocks that we're going to be turning over along this process. You can see if I hover over these positions, I do get their names but not a lot else about them, so we do want to know what we're dealing with. This, of course, you might have some leveraged ETFs, you might have a lot of other things showing up in this tool. So, just keep that in mind when I double-click on this, the reason I'm linking these to these gray tools is that it will then automatically fill up these two things. It'll fill up our chart, and it'll give us our profile on that position, as well. Should be showing up here shortly. That is the tool. So, let's get started with Filters. Why is this important? How can we utilize this along the way? So we have Filters loaded up, we can see it'll usually default to this Most Actives, and you'll see you have a second dropdown here. It currently says "Across All

Markets," you can click here to change where we are scanning or filtering from. Amex, if you're looking for maybe some more caps. If you want to focus more on the NASDAQ, which tends to be a little more tech-based. And New York Stock Exchange, of course, we all know that one, lot of the blue chips but very broad in terms of how many -- what types of positions these will hold. These are going to give you usually about two to three thousand stocks to choose from. There are a lot of them out there. We do want to make sure that we are, again, narrowing that down to some degree, especially if you have a specific process you're going through. So, keep that in mind when you're choosing these. We do have a much smaller look, as well, by index. You can go through the Dow Jones specifically, NASDAQ 100, and S&P 500. So if I only want to see those top 500 market cap stocks, well, I can choose the S&P 500; wanting to go more of a tech-based, of course, here. Another pro tip we have along the way here is Dow Jones Industrial Average. If there are 30 positions, that will show up here. So I should state, the Filters page does include -- 30 positions will come through if they apply, and then number two, it will update every 60 seconds if something drops off or comes back in. In this case, the Dow Jones Industrial Average just gives you a nice little quick way to have a watch list for the Dow. So if you want to see who is leading today in terms of percentages or lagging, should we say, in this case, so Home Depot a lagger yesterday, again, lagging today. Whereas we can see who is leading.

So we see oil and gas coming through with Chevron. And so we can get a feel for those markets in this way. Just a nice little quick way to dive into that. So we'll spend a little bit of time here moving through some of these. By clicking on Most Actives, of course, I can also find who's at those 52-week highs, right? By clicking here, it'll go ahead and screen for that information. Five or twenty dollar stocks, or twenty dollar and up stocks, I'm able to select and refine that filter. Hovering over the actual last price will tell us the name of that position, but again, doesn't tell me a whole lot. I can go ahead and double click, as well, any of these, just to show you one more time. Those gray tools will automatically link in. We can see GLNG, Golar LNG Limited, provides infrastructure for the liquefaction, transportation, and regasification of LNG. We all knew that, right? (laughs) But this is a way to pull that information quickly, get to it, understand what they do, and then we have a chart immediately here. We can see that 52-week high. How you trade based off of this information, though, will be personal to your trading style. If you feel like this isn't overbought, we can use other indicators, if you want it. Or if you feel like this trend is moving in the right direction, maybe you'll find entries here. We can utilize these other tools to do this. You can set alerts from this page, setting a price alert, or you can do an outright buy or a sell. It'll immediately launch into those trade tickets from here, or you can simply click on the bid or the ask to sell, maybe sell short if you don't own it, or buy the position by



clicking on the ask price here. It'll do that exact same thing, jump right into it. So, going through these, some of these are self-explanatory, to say the least. Of course, Most Actives would simply be highest volume overall. Pretty much always going to see a few contingents here. Always going to see SPY up in this range. Also, remember not every share is created equal. AMD at 114 dollars versus this other position that's coming through at a dollar, in terms of their dollar value's trading hands. Let's dive in here to the volume movers real quick, because that was just pure volume. But a volume mover may be another way you could screen something, right? You could go in and say, "How does that reflect its normal volume?" Maybe we're seeing more volume flying into this position, maybe it's an earnings report, maybe it's some news coming out, right? Oftentimes, we've got maybe a biotech stock here that's down substantially today. Its volume is over 10 thousand times its normal position, right? Or normal volume that we normally get to. Nineteen million shares traded, when normally it trades at a couple hundred thousand, as we can see in its normal 90 and 10-day volumes. So those are ways that we would track that information. Again, that is the percent in volume above its normal range. You can also do this on a multi-day tracking, so it's a day or a two-day tracking as well. Remember, snapshot, right? We're not looking at this and saying, volume has been increasing for the past two or three weeks. This is a quick snapshot. What is in the news? What is moving? What is out there?

And then we need to turn over those rocks, as the quote mentioned. You may have to look through 100 of these things before you find 10 of them that fit into your trading. That's just going to be part of that process. We know that active trading takes more, takes some time, if you have to track things. That is just part of the process. If, by any means, of course, you do have any questions on what any of these things means, Descriptions is here. This will launch you straight into the page, which will go ahead and read through what all these things mean. Maybe why some of these, again, may filter out low-volume stocks, or it won't have penny stocks, it doesn't have warrants, it doesn't have a lot of these other types of positions in there. It's really just going to pull ETFs and stocks that will be coming through that have substantial volume to cover that. That is most of the Markets page, again, more broad-based markets, overall information. Nothing specific to technical analysis here. Simply, volume, price; what are they telling us? And there will be a webinar in April going into some of these, the highest social sentiment scores. Again, another thing to -- if you're interested in looking into, you can read up on it in the Descriptions. It's pulling sentiment out of Twitter and Stocktwits, in order to come up with a score of positive or negative. Again, we see, even though we have some positive S-Scores, we do have some red numbers in here, but again, something we need to use from an evidentiary standpoint when coming up with ideas of stocks. We are seeing something here, maybe

we should dive in a little bit deeper, keep looking, look into what that chart looks like, and maybe start using our other things that we might use, like technical analysis, or fundamental research, even, as well, as we're going through these. But this is how we find those ideas. Real quickly, and I will go through the technicals, I do want to focus on this real quick on a couple of these because Peter's going to be talking about the Real-time Analytics here shortly, which will cover a few of these other technicals, so we don't want to talk over too much of the exact same things, but the technicals, and then there is also this Options tab, which is a completely different animal. Lot of different things here. Lot of different screens, so we will right now be focusing on just the markets and the technicals for our trading. If you are an options trader, this might be a way to find your options trades, certainly as well, on the underlying position. It won't be specific to anything, like volatility, that might show in options. Real quick, the technicals we'll be showing here, again, this is going to look a little bit different. You probably will need to use the descriptions, I know I do. The descriptions button to go back in and figure out exactly what some of these things mean and what they are measuring. We'll see some familiar things, such as moving average crossovers. Maybe we'll want to see multiple averages crossing like the 20 and the 50. Another theme that will come through here a lot is the percentages of volume. It is looking and screening for relative volume on a daily basis. Again, it's a pretty smart

tool and it's able to do this. It's not just saying, "Hey, look, well the volume's higher than it normally is on a daily basis." This is saying, "At this time of day, we are already showing a substantial relative volume higher." That gives us those ideas, as we're looking through them in the morning, to want to be able to utilize that to uncover some of those ideas. We do have these, again, this is a preference thing. 20 over 50, 20 over 200, or our golden cross here, moving average cross over to the upside, do we want it on a specific volume like 15 percent? Do we want it on the 30 percent range? We have the ability to update those. We also have Bollinger Bands, parabolic SAR. If you are interested in these a little bit more in depth, stochastics' another one, you can go up to this Help button, and you can learn a little bit more about the calculations on those by going to the learning center and the Technical Indicator Guide. They will talk about these in there. What is the moving average? What is relative strength? What is a Bollinger Band? So, it will talk about these. Make sure you understand what it's tracking before you start trading based off of these things. I do want to focus on a couple of these that are a little bit more, maybe not obvious when we pull up the uptrending stocks. Well, what does that mean? What is it calculating that based off of? Is it saying anything about moving averages? Is it saying anything about the actual higher-highs, higher-lows? It is doing that, but it is only doing that on a three-day basis. I mentioned, short-term, right? We've got two things, of

course, we have a little bit of green on the screen here as terms of the indices today, but only a couple of these are moving up, where we've seen three percent or more the last two days, and today we have another three percent move on higher volume. So to qualify for this, you need two days of up days, followed by a third day where we are seeing a higher volume peak, and those up days all need to have three percent or more to qualify. So they should all kind of look like this. They should all have this little bit of green, green, green, green, right? So we see multiple days, momentum starting to build. Where is it in that process? That's what you need this chart for, right? If this thing's been down 70 percent, it might look a little bit different as it has three up days versus a stock that's been up 50 percent and now it's continuing to follow through. They are not all created the same. Be sure, when you pull these up, again, if you have a strategy, if you have charts, you can load these right into there to find out what they do and how you want to trade them. So this was just the uptrending positions. To focus a little bit more on the short-term uptrends is a little bit different. You're going to see those will always be, pretty much, green. The short-term uptrend's going to have a little bit of other colors along the way here, right? We have some red stocks in here. Why is that? Well, this is actually looking at the lows of the day and seeing if we're finding three consecutive days of high or lows. So it is trying to find that little build-up of momentum. Here's a good one on ENTA. Let's go ahead and pull that up,

and you can see the higher lows. This will probably also -- looks a little bit like that other trend, as well. But it's really just looking at those lows. Are we building momentum here? You can see we've had a rough go of it. Starting to see some nice build here, and we're seeing it happen on substantially higher volume. If we trend this up to a 40 percent, we can see if that shows up again, and it sure does. It's back here again, in this position on the 40 percent higher volume. So, it is moving higher, it's moving higher on volume. How do we trade that? Well, again, let's now utilize some of our other strategies. And let's make sure, as we trade these things, we have exit strategies in place, we have the tools in place from our actual trading to make sure that we are not just buying blindly, that we do have an exit strategy, and we have maybe set some alerts along the way. Maybe some stop orders, something like that, to make sure these things stick along the way. The last one I'll cover is the morning and bearish -- bullish morning momentum. There's also a bearish morning momentum here that we can look for. Remember, this is not just for long traders only. You have to be nimble in these marketplaces. The bullish morning momentum -- it's a mouthful -- is going to look at basically where we opened up, needs to be within that range, about one percent within the lows. So it is saying, okay, we've opened up with a nice build here, and then it has built from that. You should see a big green candle, is what we're looking for, with no real -- it's called a wick -- at the bottom of that page. We zoom in a

little bit more, we may get a little better picture of this. We see just a little bit of wick, which means that it did not, from the open, it barely may have just dipped lower, but we've had buying the rest of the day. And that's calculated based off of this, as percentage off of over that high, which tells us a little bit about maybe this position here of Draft Kings, opens up, has this move, starts to build throughout the day. If we look at it on a much shorter term, we can see, there's your open, and we've had build. That is your momentum that has been building. Doesn't always work this way. Can come back down. But that is another way to find those ideas early in the morning, we've got to build them, we have some buying, we have some momentum moving in that upwards direction, or the other direction with that bearish momentum. So, covered a lot here. These, again, are a little bit more of the esoteric versions that we need to learn a little bit more about what they mean, how you fit those into your trading strategy, certainly again depends on the person. This is how we turn over those rocks, though, Peter. So I will be interested in a little bit more about maybe some of the other alerts we can set up. Again, this one, we don't have a whole lot of control. We do have a little bit more control over what we're looking for here, Peter, with the Real-time Analytics. I will hand it back to you if you want to cover going through that tool.

**Peter Janssen:** Absolutely. I think Filters is great, especially for that ability, as you're

showing, to really have that added to other tools and complement, given that linking functionality. So, I will go ahead and grab the screen for a moment and begin to pull up mine, which will be a little bit simplified for a moment, and then we'll expand out on it. And as you had said, Real-time Analytics, and specifically what this tool is. It's using historical data to really help identify potential opportunities. I want to say potential opportunities, because as you had mentioned, you're looking for numerous types of avenues that maybe you'll find one or two that you want to follow along or perhaps trade on down the road, only if it's going to really fit into your plan, as I had mentioned earlier, so the thought process is that a tool like this is meant to really complement the trading that you're doing but take lots of that heavy lifting or time-consuming market scanning off of your hands. Let the computing power do its work and essentially let you focus on the decision-making and if, or if not, you want to move forward. So, Real-time Analytics. How do we get here? There's actually a couple ways that this tool can be pulled up. The first is here towards the top Menu Bar on Active Trader Pro, under Alerts, which you'll find the third link down, where it will be titled Real-time Analytics, which I have here pulled up front and center. The second way that you could do this is actually towards the bottom right. Some of you in the audience might have actually noticed this in the past, there are going to be this target or bullseye, concentric circles, however you want to think about it, but this icon on the bottom right will do



the same functionality and actually pull this tool up. Now, for some of you that might have had this tool open in the past, you might have noticed that this will turn blue at one time or another, and if it does, that will signal that a trade idea is being generated right that very moment. It will probably give an example of that here shortly, but just wanted to recognize that or emphasize it, of course. If you had not ever seen that icon there in the bottom right ever change color, there it is. It just actually did it (laughs) right now for us, folks, so you can't write this any better. But that is showing that a signal actually just generated seconds ago. So this is really the power of this tool, is that if you do have it up and running, you'll notice that new signals will get highlighted in blue. Now, you don't have to have it front and center, of course, you can go ahead and minimize this tool altogether. You can have it added as a column in your positions or watch lists, which I'll circle back to shortly and show, as well. Or, if you utilize the sidebars, you can also go ahead and drag and drop it off towards one of your sidebars, tuck it away for use later. But the whole point I want to make is that this will only show signals when it's open and running. Now, other functionality here. As we had said, if this is your first time using it, you'll notice in the top left corner, it is going to default to your current positions and watch lists. This gets into where are you scanning, what is it that you're looking for, what basket of securities? As we had said, you've got the choice as a trader to implement whether you want it to be your positions and

watch lists, just one or the other, or maybe even more commonly look to index, like the S&P 500 or the S&P 100, or even the NASDAQ 100. So just keep that in mind, of course, you are not limited to just one or the other. Truth be told, even the positions and watch lists that you have, as long as it's in the universe of the Russell 3000 Index, it will go ahead and be incorporated within this tool, so just keep that in mind, once again giving you that depth and scope for what this actually offers. So, now that we actually know where we're looking, we want to talk about what we're looking into, as well. Currently, you'll notice this second menu dropdown for All Types, and you've had this ability to select all signals, you can uncheck them all and select none. I think for anyone that might be a little bit newer to this, and even for me, having all signals all at once can be a little bit overwhelming, so you do have the ability to pick and choose between these three main categories that you're seeing here. There's signals for Price & Volume, there's one that are designated as Short Term Opportunities, as well as Technical Signals; like Jonathan said, maybe a little bit more technicians out there are able to utilize this. If you are not familiar with what some of these say, the key is to be able to hover over this small question mark icon that you're seeing. Some of these are more intuitive, truth be told, a 52-week high and low, well, that's going to get sent once a day when the price of the stock is reaching that 52-week high or low, so the name says it all. Some of these others, however, in the case of

divergences for markets or sectors, you might want to look into just a little bit further, so keep in that mind those question marks for anyone that's new to this tool, or new to some of these concepts, especially those for any of those technicals; it will give a brief one-sentence description of what it is or perhaps what traders might be looking to. The last thing I wanted to say on this, and then we'll actually get into a few examples, is going to be learning about this methodology for identifying these signals, going back to the fact that some of these are more intuitive and straightforward than others. You'll also want to know, specifically, what is going to be generating whenever a time frame happens. What you'll find specifically is that, for instance, the 52-week highs and lows would get sent once daily, whereas the others, maybe, for instance, corporate events or trading ranges would not. Unusual volume would also not appear at times, so in the instance of FOMC meetings or market holidays, you'll see that that will not pull up whatsoever. I know what I wanted to do was just set the table for how this tool is used, what all goes into it, but Jonathan, any thoughts that you have quickly, at least, or anything that comes to mind in how other traders have used this in the past?

**Jonathan Lord:** Oh, absolutely. We're going to get this pulled up here. I was getting ready for another section here. No problem. So, the Real-time Analytics, right? Talked a lot about some of these other features, driving

through Bollinger Bands, we talked about RSI. You can get there from multiple ways, I do want to show you a couple things with regards to that, those idea generation. So, we're screening for these things, we have these things coming through constantly. What are some ways that we could implement some of these for certain -- we could go through and drive these into it by setting a price alert. One of the things I had was that Draft Kings through the accounts and we then go down to Trade Armor, and what'll you find is -- sorry, Trade and then Trade Armor -- so we're pulling up Trader Armor, would be another way to set some of those alerts along the way. Wanted to show this as another way, once we have found some of these alerts, it doesn't mean that we have to go in and buy those immediately. We do have the ability to then go through and hit here and maybe say, set an alert, or through the Alerts page, going there as well. So, let's go ahead and take a look at some of these other features we might have such as the Real-time Analytics, and I will go ahead and pull that through, see what we've got. So, I know you were showing some of these along the way. One of my favorite things about this tool is, again, we all build our charts together, we all make everything work out, but let me go ahead and add some of these other features here so we get a few more types of alerts. I'm going to show you something interesting. Once you have these selected, and I've got these coming through, what you can do is click on the actual position, so A&D, again, familiar, we saw that over here earlier in the

actual Filters. But you're able to pull that, go to and read up a little bit about that indicator here, so it's giving you a little bit more information, didn't have to pull the descriptions. And then from there, you can actually chart this immediately, and I'm going to show you the trick here. We're talking about MACD, and obviously it's showing, hey, we've got a bearish move here, it being in red; if we see it in green, of course, we would be going the other direction in terms of signals. But now what we've done is, actually loading this in, what it does is it automatically adds it to our chart. You don't have to go in and worry about, do I have MACD on this chart. It'll go ahead and just do that for you. So now we see A&D, we have that alert, we're able to pull it up, it's going to give us a time frame that shows that. So now we can see here we have our crossing through, we are at a bearish move with regards to the MACD; we're already sub-zero line in this instance. And again, if you're not familiar with some of these tools, if you're not familiar with some of these indicators, I mentioned earlier, go to that help button or attend some of our other classes. We do run through these quite a bit. So, what we've done, we've built this. We can see, now we can look at it, we can see we have a bearish move on the MACD, MACD being a momentum indicator, so we can now start to utilize this. We start to use our other things, such as trend, we can use chart patterns, we can find other methods of attempting to figure out if this is the signal that we're looking for. If it's not, we move on. We turned over

that rock, we can move on to the next one. So, nice thing about this tool, and the NASDAQ 100 is all we're screening for here. You can change this. And this is the biggest difference between what I was showing earlier with Filters and what I'm now showing here with this Real-time Analytics, is that you can do this on your own positions and watch lists. You can go through and say, "On my positions, what is happening from a technical perspective?" Maybe if my watch list I've created -- and you can create countless watch lists -- maybe just go through and say, all of my watch lists, "Hey, tell me if I'm seeing any of these additional things, such as maybe a 13-week high or low, maybe I want to see unusual volume," as we mentioned, with the Filters as well. We have short-term opportunities, like divergences across from each other. And even corporate events, such as dividends and how they perform based off of those. So nice little ability to control here, a little bit more than the Filters, which is telling you a little bit more -- it's already passed some of these pre-built levels. With this tool, we're able to see those come through and have a little more control about what we're seeing and what is screening through. So those positions and watch lists, again, I think is probably one of the best steps we have, best things we have in order to pull that through our own system. You can also do that and view that, and have these alerts either through here, or you could also do that on your Positions page. If you pull that up, this again is the test account, you'll see a Real-time Analytics. If there is a signal, it will

come through here for us. It will tell us, we have a bearish move on the MACD, a bullish move. And then we can, from here as well, dive into it. So, keeping track of our positions, watch lists; you can also do this that way, as well. So that is a great way to keep an eye on our positions, especially if there's something you are specifically looking for with regards to trading, maybe Bollinger Bands, MACDs, SMAs, again, all of these are here and have additional info. Peter, I think you're back up here. Did you want to take the screen back, or...?

**Peter Janssen:** Yeah, I am, if you'll (laughs) if you'll allow me to. I appreciate everyone's understanding there.

**Jonathan Lord:** No problem.

**Peter Janssen:** Technology is the ultimate double-edged sword. But really to continue that though process that you had -- of course, thanks for being able to step into play there as I was getting things booted back up here -- but what you're going to find as Jonathan was saying was, not only the ability to be scanning these, depending on different indexes or depending on different positions or watch lists, but also the power to really add these to different watch lists that you have. As Jonathan was saying, this is for idea generation,

but it's not going to be the fact that every single of these is going to be an idea that you're looking to play off of. Here's one potentially that he was referring to, which actually gets into the Corporate Events section; under Corporate Events, when you have these applied, it'll actually show you different types of dividends and get into additional detail and give some context behind this. So, if you were to pull this up as an example here, it's going to give you more information and say that it's going to show historical returns that have been had, and that's going to be a minimum, an average, and a maximum. Well, what are these? Why does it show the announcement date? When does it show the ex-dividend date? It's going to say that this scan -- based off, once again, historical trends, not necessarily guaranteeing this is going to happen, but, historically, at least over the past five dividends -- the price there of Abbvie has actually increased between the announcement and ex-dividend dates and, historically, the price of Abbvie has risen there, that 12 percent, with a minimum of 1.8 and a maximum of 33.4. You can take a look at this on a chart; if you do, what it's going to do is call up the Events tab on your chart there in the background and show you a little more context. Now, the D is going to represent here the actual ex-dividend date itself, and it will tell you when the pay date was. If you would like to do a little bit more digging yourself and go back to when the announcements were, you can certainly hop over to Fidelity's website and have the ability to research specifically when that



was, but the thought process here is that, well, based off historic trends, when they've made announcement, up until the point of their ex-dividend date, on average, they've risen roughly that 12 percent or so. So, let's say that that maybe is sparking your interest, perhaps, on Abbvie or any of these; what I wanted to mention was this capability to have it added to a watch list for, perhaps, viewing later or, once again, doing additional research. So, by clicking in the top left corner next to the symbol itself, among other things -- launching trade tickets, other types of avenues -- you've got the ability to also Add to Watch List. I've created one here just for our purposes, just titled it very simply, "Real-time Analytics." And if you were to go add a specific symbol, in any of these, to that watch list you've created, as Jonathan had mentioned previously, now we've got a running watch list titled "Real-time Analytics" that you can refer back to time and time again, do additional research. And you'll also notice that it'll generate these icons. And this is what I wanted to show you, more or less, was that if you have this Real-time Analytics column added, which you can add here by clicking on Manage, and Add & Remove Columns, you have the ability to see different icons that will pull up and give you a little bit more of that snapshot that we were referring to, previously, by getting into the tool. I've heard clients say that this is tremendously helpful for getting and growing a watch list, once again, with that theme of maybe looking at a hundred securities and finding a handful of

good ideas. This could be a potential way to monitor different events of that nature. Also wanted to touch on maybe just a couple technical ones. I know that you already had, as well, SMA crossover. I think the majority of our audience might be familiar with, at least at one time or another; if nothing more, perhaps reading newspaper articles or hearing on the news. That's going to be those simple moving averages, and crossover trading is something that technicians will look at very often and will be commented on. I'm going to go ahead and alleviate this chart of Abbvie, and then just give a few examples here. And also emphasize, much like the Filters tool, have the ability to scan between different types of moving average periods, this tool will also -- as you see here, we've got the 50-day simple moving average crossing above the 200-day simple moving average. And it's indicated with this icon that you're seeing in green, upward pointing arrow. Try to make it as intuitive as possible, but if you're not as familiar, keep in mind you can expand this, take a look down below, and it'll give you that context; that, traditionally, when that 50-day period moving average, is crossing up and above the 200, it could be considered a bullish event. By taking a look at the actual chart itself, once again, it will go ahead and do all that heavy lifting for us, as we had said previously. Now you've got the three-month chart on a daily basis in the background. It'll also will go ahead and add the 20, 50, and 200- period moving averages, which is what this tool will scan for. And if any of these

colors are maybe a little bit too much for your eyes -- for instance, that yellow is definitely very obvious to me, I might actually change that a little bit -- know that you've got the ability to really modify these as you see fit. Now it's a little clearer on the eyes. This green is our 50-period moving average, which is now just beginning to cross up and above that 200-period moving average, showing that that intermediate-term price action, or strength, is beginning to elevate up and above that longer-term moving average, itself. Once again, as you had seen, could be considered a bullish event. Doesn't necessarily mean that it's going to be a trading opportunity but might be something you want to keep your eyes on. Once again, very simply, you can add to this watch list if you would like. And as you see down here in the column in real-time, they will go ahead and begin to add themselves, and you'll also go ahead and see the different icons specifically, as well, on that column header itself. Now, as I mentioned, we don't need to go too far into it because many of these examples will be very similar, but as you have noticed, of course, it will scan for 50 crossing 200, upwards and downwards. It will also scan for 20 crossing 50, so that'll be more of that representation of a shorter-term moving average beginning to cross up and above a 50-period moving average towards the upside; once again, seen potentially as a bullish signal. Maybe you want to keep your eyes on it here. Similar type chart that you have there in the background, showing that this shorter-term price action beginning to get up

and above that more intermediate term. So, the thought process here, especially when having these against the grain on your own positions, is that you have the ability to go through each and every position that you own, and all of your watch lists, and have these indicators added. And you can look for different crossovers. You could look for different types of events, like MACD crossovers that Jonathan had talked about, or different types of technical indicators. Fifty-two week highs, lows. Any of these different types of opportunities, but the whole power and beauty of these tools is really being able to set the parameters that you want; within an instant, have the computer do the computing power and then essentially save yourself the time, once again, getting back to really the important decisions of if you want to put your capital to work or not. But having that said, I know that there was a little bit of that quick intermission there, Jonathan, where you had taken over. We've been able to go ahead and show a couple different tools here and now. Obviously, with these Real-time Analytics being added to different watch lists that you can create, or also your positions. Any thoughts that you have, in addition to what we've discussed here and now so far?

**Jonathan Lord:** There's not one way to do this, right? And what we're trying to do is give you that information. Idea generation, that's one of the great things about this Fidelity tool, Active Trader Pro. You can get ideas. We still have all

of the available things on the website that -- institutional-level research that you can go into on a stock, again, dependent on what you use. These are great ways to do this, and technical analysis is a great way to, maybe once you have located a position, to utilize some of those risk tolerance, right? How much risk do I want to take? When is the right time to exit? We often talk about these positions as something we might buy and hold, but you can't hold everything forever, not for every Apple; there's going to be quite a few positions that just don't hold up, right? That don't have that same performance. Or, you may see those huge drawdowns along the way. Is not all the same

END OF AUDIO FILE

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