

Fidelity Viewpoints®

market sense



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The latest headlines, the current market conditions,
and what it all means for you.



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Viewer Question

“Recently Market Sense claimed we may be backing up into the mid-cycle phase of the business cycle, and not approaching a recession. Do you still think that’s what may be happening?”

Tax Loss Harvesting

How it works



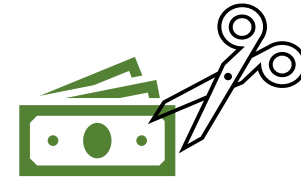
Combine Gains

+



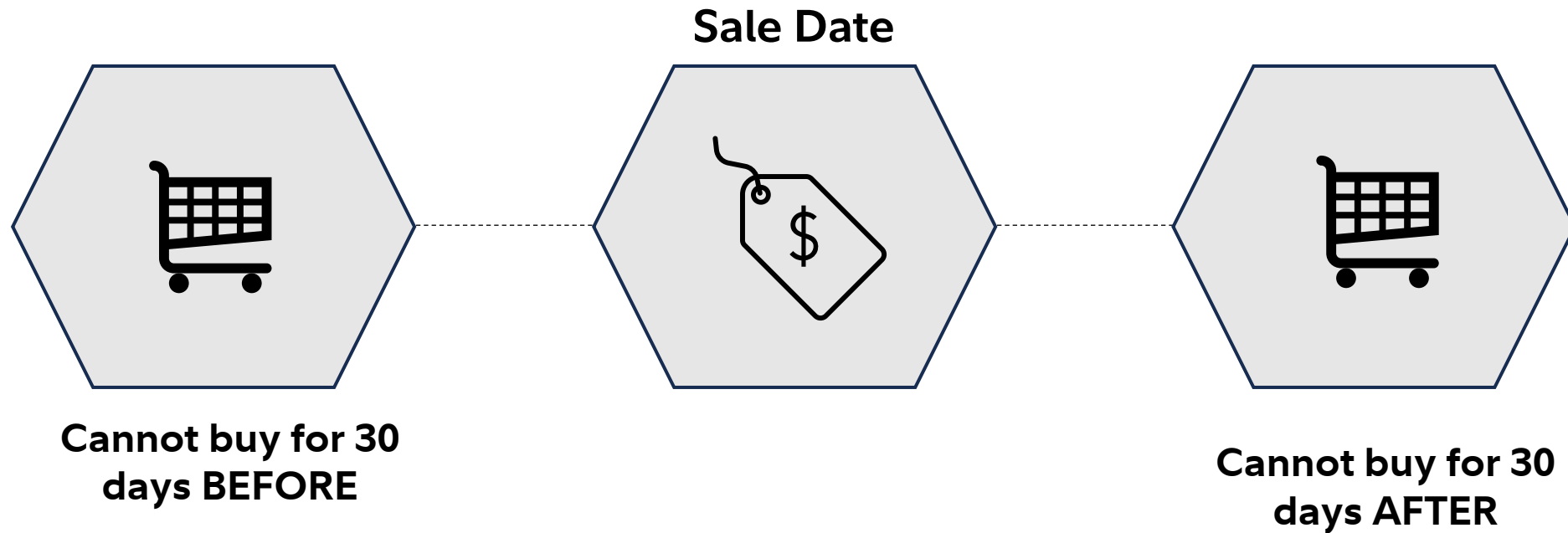
With Losses

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Reduce or Eliminate Tax Bill

Wash Sale Rules



For Illustrative Purposes

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1. Bloomberg March 28, 2024: www.bloomberg.com/news/articles/2024-03-27/stock-market-today-dow-s-p-live-updates
2. Bloomberg March 29, 2024: www.bloomberg.com/news/articles/2024-03-29/powell-says-latest-inflation-data-in-line-with-expectations?srnd=homepage-americas
3. Morningstar Study: www.fidelity.com/bin-public/060_www_fidelity_com/documents/tax-efficient-investing.pdf
4. Fidelity Presentation "Tax Efficient Investing"
5. Viewpoints Newsletter, December 5, 2023: www.fidelity.com/viewpoints/personal-finance/tax-loss-harvesting
6. Viewpoints Newsletter, July 27, 2023: www.fidelity.com/learning-center/personal-finance/wash-sales-rules-tax
7. Viewpoints Newsletter: January 31, 2023: www.fidelity.com/learning-center/personal-finance/managing-taxes/tax-smart-strategies

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It is not possible to invest directly in an index.

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