

Searching for Stock Ideas on Fidelity.com



AGENDA

- **Finding Stocks**
- **Stock Analysis**
- **Monitoring Stock Ideas**
- **Wrap Up**
 - Mobile Options
 - Resources
 - Q&A



What is Top Down Analysis?

Examine the larger economy to find investment ideas



Find: Use Sectors & Industries Overview

What is it?

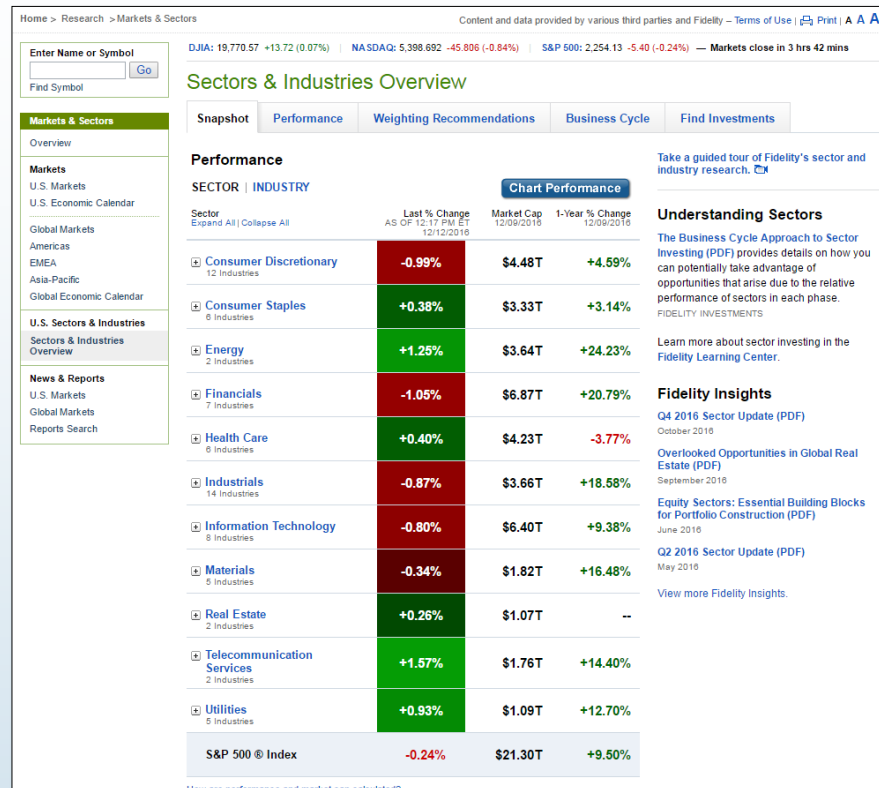
- The Sectors & Industries Overview page enables you to conduct research at the sector or industry level

What's unique about it?

- Use it to compare each sector to each other and the S&P 500 Index as well as see how the underlying industries affect the overall sector performance
- Use the Business Cycle Approach to sector investing to potentially take advantage of opportunities that arise due to the 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



Screenshot is for illustrative purposes only.



Research > Markets & Sectors > Sectors & Industries Overview

What is Bottom Up Analysis?

Identify key criteria or attributes to look at for a particular security



Find: Use Stock Screener

What is it?

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

What's unique about it?

- Leverage predefined screens to see how industry experts identify stocks with distinct characteristics
- Add your own stock ideas to the results list to see how they compare
- Choose from over 140 criteria to focus stock characteristics based on your specific goals
- Filter stocks easily
- Access anywhere from any device

Where can I learn more?

- View the **Getting started with the Stock Screener** video from the Fidelity Learning Center

Stock Screener

Start your stock screen by applying filters to the left

OR

Start a predefined screen developed by experts

Most Popular GROWTH GROWTH/VALUE VALUE TECHNICAL INCOME OTHER

About Most Popular Screens

Here are the most popular independent expert screens across all style types, based on last month's usage figures from Fidelity.com.

Growth at a Reasonable Price (GARP)
Zack's Investment Research, Inc.
Growth at a reasonable price (or GARP) is a style that looks for both growth and value all at the same time. This style was made famous by the Fidelity legend Pet...
[Learn More](#)
[View Matches](#)

Diamonds are Forever-Bullish
Recognia, Inc.
To identify companies that have experienced a recent bullish Diamond technical structure and have attractive Price Earnings Growth ratios.
[Learn More](#)
[View Matches](#)

A+ Stocks With High Projected Growth
SSP Capital IQ
Although chasing the latest hot issues can be exhilarating, going the quality route is usually a better way to build wealth over time. That's because stoc...
[Learn More](#)
[View Matches](#)

Value-At-A-Reasonable Price - VARP
EVA Dimensions
These are stocks that have an in-sector "PRVIL" score between the 95th and 98th percentile. It's the "A-team" from EVA Dimensions -stocks that are attractive...
[View Matches](#)

Low Price and High Projected Growth
SSP Capital IQ
While the relative value of a stock is usually more telling than its absolute price, investors who want to get the biggest bang for their buck often focus...
[View Matches](#)

Big Buys / Best Bargains
Zack's Investment Research, Inc.
To find top stocks with Zacks Buy Recommendations at the best bargains. These companies have above-line growth rates but below-line valuations.
[Learn More](#)
[View Matches](#)

Screenshot is for illustrative purposes only.



Research > Stocks > Stock Screener

Analyze: Use Stock Research Dashboard

What is it?

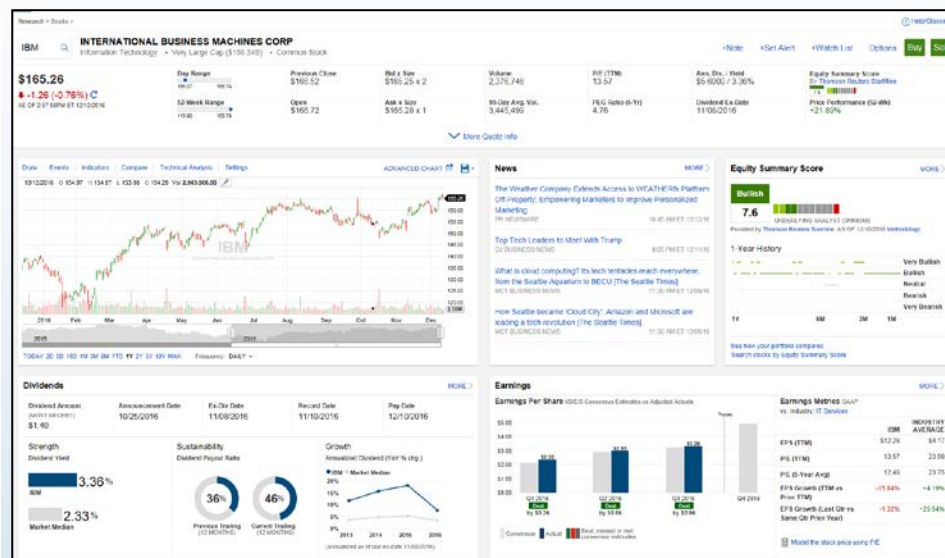
- A snapshot of the selected stock

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 all from one page
- Provides Fundamental Analysis and Recognia Technical Analysis to save time on research and get an overall assessment of a company's valuation, quality, growth stability, and financial health
- For additional research view Social Sentiment and Top Competitors

Where can I learn more?

- Visit the Fidelity Learning Center to learn more about Fundamental Analysis



Screenshot is for illustrative purposes only.



Research > Stocks: Enter a symbol, select Snapshot

Analyze: Use Equity Summary Score

What is it?

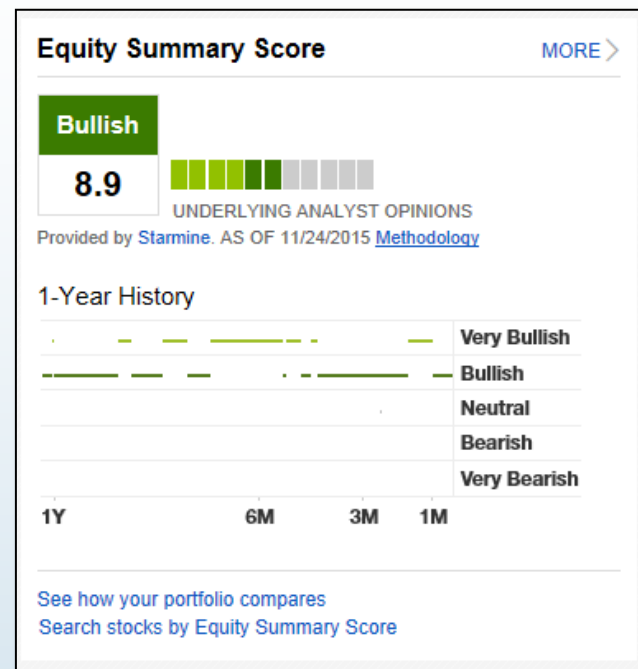
- A single stock rating of third-party analysts opinions that is weighted based on how accurate they've been in the past

What's unique about it?

- Use it as a screening criterion, to help identify stocks you may want to include or exclude from further analysis, in conjunction with other criteria
- Use it to 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 Thomson Reuters StarMine** from the Fidelity Learning Center



Screenshot is for illustrative purposes only.

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

Monitor: Use Customized Research Experience

What is it?

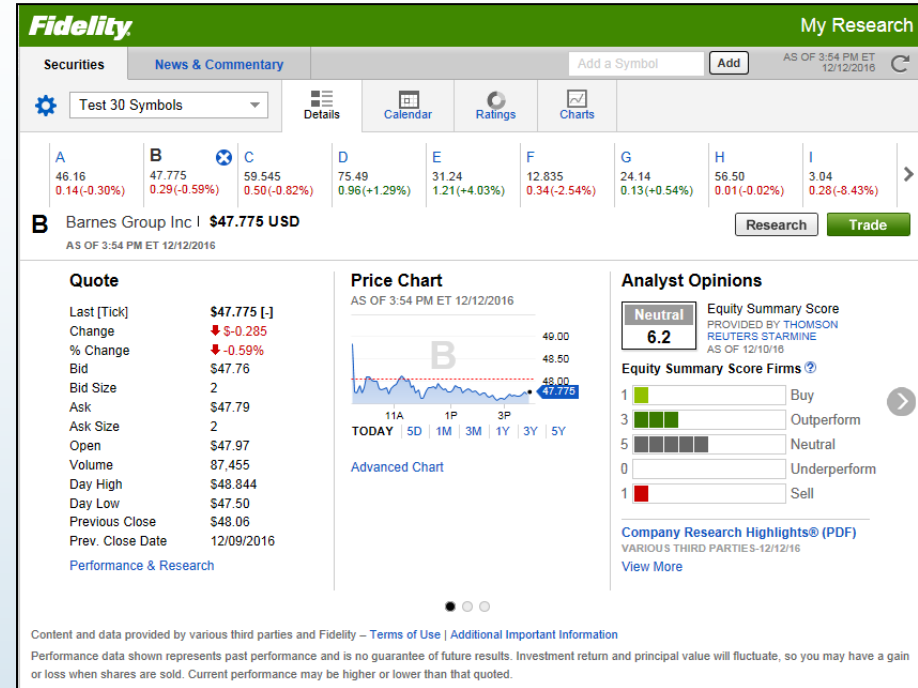
- My Research is an interactive tool that allows you to create a personal and relevant research experience

What's unique about it?

- Customize your view to see what's most important to you
- Easily get your fundamental facts such as a quote or the Equity Summary Score, along with news and market commentary all in one place

Where can I learn more?

- View **Customizing research on Fidelity.com** from the Fidelity Learning Center



Screenshot is for illustrative purposes only.



[Research > Stocks > My Research](#)

Fidelity Mobile®

- **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



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Take a course

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Example: Using key financial metrics and ratios



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Learn how to navigate and leverage Fidelity's research and trading tools.

Example: Researching sectors and industries on Fidelity.com



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You have access to even more resources



Speak to a representative

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