

HOW TO SEARCH FOR INVESTMENTS

GETTING STARTED

HELP GUIDE

Use this step by step guide
designed to help you
get started.

TABLE OF CONTENTS

How it works: If you're looking for help on a particular part of this guide, you can find the step you are trying to complete below, and then broken down into smaller tasks.

Page 3 - **Before you begin**

- View our tools

Page 4 - **PathFinder**

- Choose your risk level
- Enter your contribution details

Page 5 - **Select 50**

- Filter your results
- Research your funds

Page 6 - **Investment finder**

- Select your investment type
- Search and filtering your investments



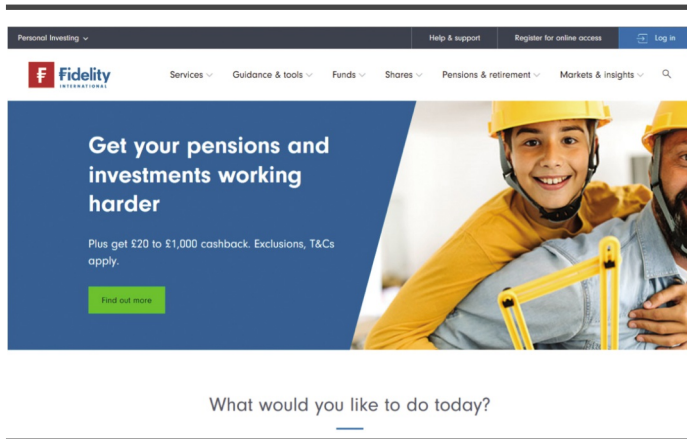
Important information

The images used in this guide are for illustration purposes only and should not be construed as recommendation to buy or sell any investments. When reviewing the performance of your investments, it's also important to remember that past performance is not an indicator of future performance. Fidelity Personal Investing does not give financial advice. If you need advice, please speak to a financial adviser

GETTING STARTED



Go to the Fidelity homepage



Scroll down to **how would you like to invest?**

The image shows three distinct cards for investment tools, each with a blue header and a white body. The first card, 'PathFinder', features a line graph icon and the text 'Show me a few ideas'. The second card, 'Select 50', features a '50' icon and the text 'Show me your experts' picks'. The third card, 'Investment Finder', features a magnifying glass icon and the text 'Show me everything you offer'. Each card includes a brief description of the tool's function and a blue button with a right-pointing arrow at the bottom.

There are three different tools to help you, from our PathFinder tool to our Select 50 funds and Investment Finder.

PATHFINDER



Find a ready-made solution with **PathFinder**

Start PathFinder

If you're looking for a straight forward and simple way to invest, use our PathFinder planning tool to select a ready-made, diversified fund based on your preferred risk level and savings goals. Our investment experts will then actively manage your money for you in a fund that invests mainly in a range of funds.



Choose your risk level

1

Choose your risk level

You can choose your risk level between 1 and 5. If you are unsure of what to choose, you can use our risk calculator tool on our website.

Enter your contribution details

Lump sum

£1,000

Monthly contributions

0

Number of years

10

Filling your contribution details will automatically populate the graph. The initial investment, monthly contributions and number of years will be taken into account.

SELECT 50

Get guidance on top-rated funds using **Select 50**



Use the filters to adjust to your preference



View and sort results



Filter the Select 50 funds

Fund provider	Asset class	Investment Association(A) Sector	Morningstar rating
All	All	All	Show All
Ongoing charge (%)	Management style	Fidelity funds only	All share classes
All	All	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No

[Reset filters](#) [View Results](#) [View more filters](#)

Select investments from your 52 results

[Edit filters](#)

Morningstar rating ▼

★★★★★

Deal

[Show our view](#) ✓

The filter fields can be selected to reduce your search results. You can also choose to see more filters by selecting 'View more filters'.

You can sort the table of results by selecting the relevant column header in addition to selecting 'Show our view'. These can also be added to a shortlist for comparison purposes.

Once you are happy, you can select 'Deal' to proceed onto a deal or do more research if you like.

INVESTMENT FINDER



Build your own portfolio with our **Investment Finder**. Start by selecting your investment type

1

Please select an investment type

Funds Shares Exchange Traded Funds Investment Trusts

[Investment types explained](#) ⓘ

For more information on these types of investments, select 'investment types explained'.

If you already know what you're looking for, use our powerful search tool to explore our full range of investment options to find, filter and select your own combination of funds, shares, investment trusts and ETFs (Exchange-traded funds).

Search for your investments

2

Search or filter to find investments

Search by asset name or number

3

Select investments from your **2864** results

[Edit filters](#) ✎

You can search for your investments. You can use the tool to filter investments that fit your preference. These can also be added to a shortlist for comparison purposes.

This may take a few seconds to load due to the large number of investments being searched.

THANK YOU

We hope you found this guide useful.

If you need help with another journey, you can find our other guides on our website.

