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Corporate Communications
(617) 563-5800
fidelitymediarelations@fmr.com

Anjelica Sena
(201) 915-7814
anjelica.sena@fmr.com

FIDELITY INVESTMENTS® ROLLS OUT NEW FEATURES ON BOND TRADING PLATFORM

Bond Beacon™, Fidelity Institutional's Digital Fixed Income Trading Solution Accessible Through the WealthscapeSM Platform, Now Available to All Wealth Management Firms

BOSTON, March 22, 2022 –Fidelity Investments® today announced new features and expanded access to [Fidelity Bond Beacon™](#), a Fidelity Institutional® solution designed to provide wealth management firms with a comprehensive platform to manage all aspects of fixed income investing. Bond Beacon™, which was first offered to a subset of Fidelity Institutional clients in August 2020, is beginning to roll out to all client segments, and provides advisors increased visibility into the bond market.

According to Fidelity research, 35% of advisors would find it easier to invest in individual bonds for clients if they had a simplified process to access and tradeⁱ. Bond Beacon helps address this by using real-time data and analytics to trade against live markets, providing a robust view into fixed income markets and substantially cutting the time needed for transactions.

Sandy Pourcillie, head of fixed income for Mariner Wealth Advisors, experienced these improvements first-hand: “Bond Beacon provides visibility of an account’s holdings with options of click-to-trade or RFQ (request for quote) functionality,” says Pourcillie. “This saves so much time when an account needs to liquidate bonds. No more manual data entry into a different order or execution platform.”

James Beale, Head of Capital Markets and Managed Solutions at Rockefeller Capital Management, says Bond Beacon helps its advisors focus on more personalized experiences. “The significant increase in inventory and additional functionality that Bond Beacon provides

are good examples of how we are arming our advisors with new tools that enable more meaningful conversations with investors,” says Beale. “Increased visibility into the bond market has been a game changer, particularly in our current interest rate environment. It’s really helped us differentiate ourselves as a premier wealth management platform.”

Fidelity deepened Bond Beacon’s capabilities and added new features to provide advisors, broker dealers and family offices with even more support to manage and construct fixed income portfolios. The platform supports many workflows in fixed income investing with real-time holdings and easy-to-use integration of sophisticated trading protocols that now provide intermediaries with increased access to the broader bond marketplace through:

- **Enhanced liquidity** leveraging the open architecture brokerage technology from Fidelity Capital Markets, Fidelity’s institutional trading arm, delivers expanded electronic market connectivity and introduces structured investment markets;
- **Robust analytics and data pre-trade, at-trade and post-trade** to better inform decisions and oversight throughout the execution lifecycle, including advanced views of risk, portfolio positioning analytics, and potential returns across relevant fixed income market scenarios;
- **Expanded reporting to support both intermediaries and their investor clients**, including portfolio analytics, portfolio proposals from executable markets, offering reports and post-trade order details; and
- **In-depth, real-time fixed income position and account information** with WealthscapeSM, Fidelity’s advisor technology platform, including account access controls that ease collaboration and efficiency between colleagues and with the home office.

“The success of Bond Beacon is directly tied to an increase in bond issuance, market complexity and regulatory obligations which are all making it increasingly difficult for wealth managers to navigate the marketplace. Bond Beacon addresses these challenges head on for intermediaries without sacrificing access to the marketplace or the quality of their execution,” says Bryan Schmid, Head of Fixed Income Platform Solutions at Fidelity Institutional. “We want advisors to be able to spend more time managing their client relationships and less time navigating the bond market.”

For more information about Bond Beacon, please visit go.fidelity.com/bondbeacon.

About Fidelity Investments

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ⁱ Source: Fidelity Investments, “Advisor Investment Decision-Making: Discretion and Portfolio Decisions” research, August 2021