## What's New: Status Bond & CD bid quote requests



Beginning June 2019 clients are able to access detailed information about bid requests, resulting in the ability to make quicker and more effective decisions about selling bonds and CDs.

## FIG CITY CUSTOMER SERVICE | PROFILE | OPEN AN ACCOUNT | REFER A FRIEND | LOG OUT Search or get a guote **Getting Started** Why Fidelity Accounts & Trade Planning & Advice News & Research Investment Products Access the Bond & CD Bid Quote Status dashboard by selecting the Bid Requests link from the Fixed Income, Bonds & CDs page. Bond & CD Bid Quote Status Orders | Online Message Center Fixed Income, Bonds & CDs Con Select an Account Find Bonds & CDs | Research & Markets | Bond Tools | Service & Solutions | Understanding Bonds Individual NEW Competitive bond pricing study. See how much you can save at Fidelity AS OF 09:59 AM ET 05/31/2019 C Choose from 50,000 new issue and secondary market bonds and CDs, and approximately 75,000 total offerings quotations when including our depth of book. Only \$1 per bond mark-up/mark-down for secondary bond trading, \$0 for US Treasuries online Request Date/Time Issue Description CUSIP **Bid Valid Until** Action By CUSIP or Type (for bond name) search 🖴 05/31/19 9:28 AM ET WELLS FARGO BK N A .. 94986TW86 81 11:15:00 AM ET Responded Outlier Bid Bid Requests 05/31/19 9:03 AM ET AXA SA ... 054536AA5 136.82 10:00:05 AM ET Responded Place Order Bonds (20,200) New Issues (100) @ CDs & Ladders (633) Annuities Funds ETFs Manag 05/31/19 8:28 AM ET ROYAL BK OF CDA BD. 78013XM62 98 09:24:45 AM ET Expired Request Bid

## **Key Steps**

- Select an Account Toggle between accounts to view a complete list of current and previous bid quotes requested within the last 30 days.
- **Bid Status** View the exact time that you can expect your Bid Response to be ready for review. The **Action** cell will remain blank until your bid is ready.
- 3 Place Order Review the bid response and conveniently proceed to the trade ticket by selecting the Place Order button.

## **Additional Details**

- Occasionally, a Bid Quote request will result in a No Bid Response.
  Select Request Bid to place another Bid Quote request.
- Bid Quotes are limited to two per day, per cusip.

Sample Bond & CD Bid Quote Status Dashboard

- Once an order is placed, the Action column displays Matched.
  Check the Order status page by selecting the Orders link at the top right of the page to view your order status.
- Sell orders for Bonds or CDs resulting from Outlier Bids must be placed through a Fidelity representative.

Screenshots are for illustrative purposes only

In general, the bond market is volatile, and fixed income securities carry interest rate risk. (As interest rates rise, bond prices usually fall, and vice versa. This effect is usually more pronounced for longer-term securities). Fixed income securities also carry inflation risk, liquidity risk, call risk and credit and default risks for both issuers and counterparties. Any fixed-income security sold or redeemed prior to maturity may be subject to loss.