

Hongshu Chen, PhD, CFA

Portfolio Manager / Quantitative Analyst
Fidelity Investments

Hongshu Chen is a Portfolio Manager / Quantitative Analyst in the Quantitative Research And Investments division at Fidelity Investments. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing, and other financial products and services to institutions, financial intermediaries, and individuals. QRI supports our investors with timely and actionable insights, manages systematic products and solutions, and enables scale through adoption of common platforms.

In this role, Hongshu is responsible for working closely with the Target Allocation and Canadian Funds portfolio management teams responsible for conducting strategic and active asset allocation research to improve the investment process. He also provides quantitative research and analysis to support investment decision-making, including portfolio construction and risk management. Hongshu works on the Multi-Asset Class Quantitative Research team.

Prior to assuming his current role, Hongshu was a quantitative analyst supporting managed account products. In this capacity, Hongshu was responsible for developing quantitative models, risk frameworks, and asset allocation strategies. Hongshu joined Fidelity in 2007 and has been in the financial industry since 2007.

Hongshu earned his Bachelor of Engineering from Tsinghua University in China, his Master of Science from The Ohio State University, and his PhD from The Ohio State University.

Professional Designations:

Chartered Financial Analyst (CFA)

Portfolios Managed:

Fidelity Health Savings Fund

Fidelity Health Savings Index Fund

The Chartered Financial Analyst (CFA) designation is offered by the CFA Institute. To obtain the CFA charter, candidates must pass three exams demonstrating their competence, integrity, and extensive knowledge in accounting, ethical and professional standards, economics, portfolio management, and security analysis, and must also have at least 4,000 hours of qualifying work experience completed in a minimum of 36 months, among other requirements. CFA® is a trademark owned by CFA Institute.

May not reflect all strategies and/or portfolios managed by the individual. The list above includes publicly traded investment products regulated under the Investment Company Act of 1940 (e.g., U.S. domiciled mutual funds, ETFs), commingled pools, ABLE portfolios, interval funds, closed-end investment funds, and institutional portfolios (separate accounts). If a manager oversees more than ten portfolios; the top 10 portfolios are shown based on total assets under management.

May be distributed by the following affiliated entities: Fidelity Distributors Company LLC, Fidelity Brokerage Services LLC, Member NYSE, SIPC, both registered broker-dealers; FIAM LLC, Fidelity Management & Research Company LLC, Strategic Advisers LLC, all registered investment advisers.

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