



GREAT PERFORMANCE. GREAT PRICE.

Welcome to the 4th Quarter 2018 Newsletter.

[Visit our Website](#)

Message from the President

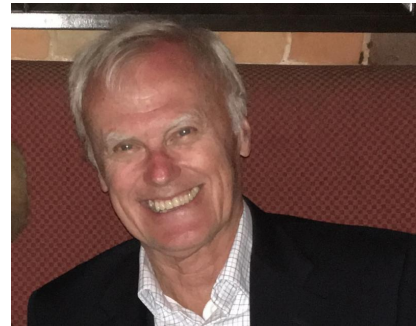
Wishing all of you happy holidays!

Here is news of Telemet's latest release and news about our integrated investment platform.

Telemet continually works to ensure that our platform remains relevant and enhances your workflow.

Fred Parsons, CEO

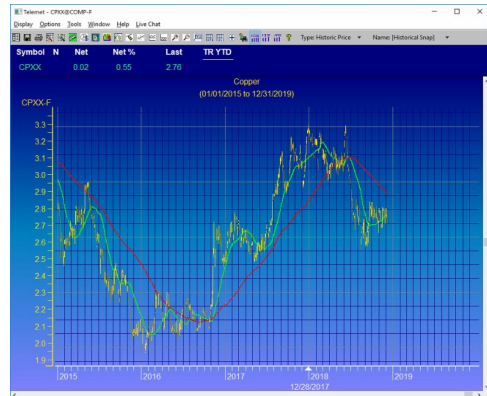
Please send me an [email](#) with comments!



Enhancement News

Real-Time Index Futures

Real-time index futures are valuable for sensing market direction and momentum. Your trading desk may be interested in these real-time futures now with bid/ask, open interest and trading volume. Many traders use the S&P Mini future, but others include various sector specific indices, such as materials, financials, and industrials. Further there are index futures on Russell Growth and Value, the Dow, and NASDAQ. Call or email Telemet for more information.



Real-Time Energy & Metals Futures

Advisors closely following the Energy Sector should be interested in the heating oil, gasoline and ethanol futures market. These markets reflect current and forward pricing of these commodities.

The metals futures, such as "Doctor Copper", give an indication of the future state of the world economies. These futures, with bids, offers, open interest and trade volume can be tracked with Telemet.

Shown above a Doctor Copper chart with the 50 day moving average crossing the 200 day line in June of this year.

Call or email us for more information on real-time futures.



More Tamarac News!

Tamarac provides portfolio and client management software. We added links to Tamarac. With these new links, you see performance, sector analyses, and relative returns on your equity portfolios compared to your chosen benchmark. You also see sector under and over weightings, which sectors worked and within each sector, which stocks worked for any calendar period.

The Telemet/Tamarac links have been tested and verified. Tamarac clients must execute an "API Agreement" to see these reports down to the client level (there is no charge accompanying this). Once set up, Tamarac clients see attribution and contribution reports instantly - no need to wait overnight for reports; they appear within seconds on the desktop to be printed, viewed, or downloaded into spreadsheets.

Total Returns on Funds on reports and pages

With stocks, display total returns for 7-days, 30-days, 90-days 180-days, 360-days, WTD, MTD, YTD last quarter, etc.

We added the total return numbers for funds to our custom pages. We have done so for funds reporting these returns.

We also added funds as a new asset class to our portfolio attribution and contribution (bundled into your platform). As part of this effort we added both capital appreciation and dividend returns for some funds. So those of you that use funds as part of the asset mix for your clients, now have a new resource and more information. We are now rounding out these data and adding more and more dividend data for our funds universe.

To get the latest version of Telemet Orion, please go to the link at the bottom of this newsletter. Call or email client service for help on this or any of the enhancements described above.

Telemet Upcoming Conference

ABA Wealth Management and Trust Conference

Telemet is exhibiting at the American Bankers Association Wealth Management and Trust Conference February 10-12 2019 in San Francisco and we invite all clients and interested parties to come by and say hello.

The conference will help you learn how to make full use of the latest technologies, and become a forward-focused advisor for your clients.

Here is a [link to the ABA show information](#).

We hope to see you there!

Advent Software Updates

Our TeleVista and Moxy platform news

Our TeleVista platform links Advent APX and Axyx to Telemet for portfolio analytics and reports.

We have enhanced the interface in three ways based on client comments.

1. Advent APX now has a split adjustment link.
2. Advent Axyx trade blotter has been enhanced to include "withholding tax support"
3. Advent Axyx security information file contains issue country code for tax support
4. TeleVista can now update ADR Ratio in an Advent Axyx .enm file
5. Advent cash is now more flexible; different kinds of cash can be designated in TeleVista.

Also there is a clarification on Advent Moxy documentation.

This Advent Moxy documentation says "Telemet is not compatible with XML 6.0". Older Telemet QuoteService software used XML 4.0. The latest Telemet QuoteService uses XML 6.0 and is called version 1.0.3.0. You can download this software with the link below.

Telemet also enhanced the reporting capabilities for Black Diamond, Telemet added "Portfolio Groups" to the portfolios that Telemet can analyze with its attribution and contribution software. Portfolio Groups are also shown in "As of Date" reports. Links to the other portfolio accounting packages (such as Advent APX, Axyx and Orion Advisor) already support "groups" and "families".

Webinar

Year End Reports using Telemet

Our next Webinar will be "Year End Reports". You may know how to get market quotes and news from Telemet, but may be unfamiliar with how to access and use some of the Year End Reports available on the platform.

By attending this Webinar you are likely to learn more!

The Webinar will be held in January and will be recorded for those that miss it. An announcement will be made later.

Here is the link to all past recorded Webinars [Webinar](#)

To get help to find or review past webinars which contain valuable orientation materials on charts, spreadsheets and attribution, call/email or chat with a member of your client service team, 800-368-2078 or support@taquote.com.

Important Links

- [Telemet Orion Latest Version v8.2.05.25 dated 12/18/18](#) - Select Telemet Orion software
- [TeleVista for Advent Axyx v2.5.30 dated 12/10/18](#) - Select compatible software
- [TeleVista for Advent APX v1.5.22 dated 11/9/18](#) - Select compatible software
- [Telemet QuoteService XML 6.0 compatible v1.0.3.0](#) - Select compatible software
- [TeleFlash Proprietary Data Publisher v1.3.3.8](#) - Select compatible software
- [Sept 2018 Newsletter](#)