



# GREAT PERFORMANCE. GREAT PRICE.

Welcome to the 1st Quarter 2019 Newsletter.

Visit our Website

## Message from the President

Here is the latest news on Telemet

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

### Options Montage

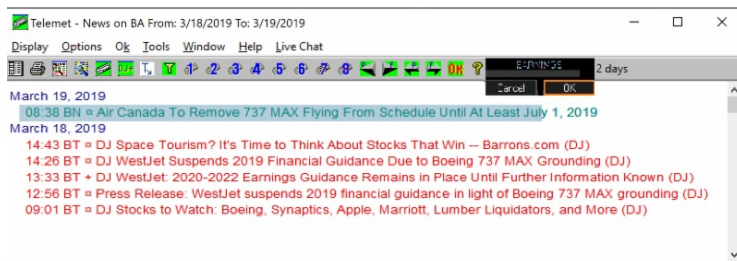
Many clients use call writing as a strategy to boost returns. Clients have asked that we enhance our Options Montage page to make it easier to read because today any equity can have thousands of options offered, especially since "weeklies" (options expiring each

week) were introduced over the past dozen years. To help make sense of all these options and data, we have added two selectable filters to Options Montage.

**Banishing Weeklies** - For any underlying equity, one filter view removes weeklies and displays only the traditional monthly options. The monthly options show our standard fields - prices, bids, offers, sizes, open interest along with the standard "downside protection," the Greeks, and theoretical values.

The second filter view shows only those options around a strike price band. While the strike band is user selectable, most users prefer seeing those options just in the money (ITM) and those just out of the money (OTM). This is the default for the filter view and the band (price delta below or above the price) is user defined but the default set at 3.

Call or email us for more information on options montage



## Key Word Filter on Dow Jones News

Dow Jones News subscribers now have a filter on the news window. This filter conveniently shows news for the key word

typed into the filter. So for example, you are looking for a story on "earnings" on a ticker, or a list. Type the word into the filter and see only news with the word "earnings" mentioned in it.

More complex filters can still be formed with the Boolean search function in the News Query. This shortcut was implemented due to a request from clients.

## More Tamarac and Orion Advisor news

Tamarac and Orion Advisor (along with SS&C Advent and Black Diamond) provide portfolio and client management software. We have links to all these platforms. With these links, you see performance, sector analyses, and relative returns on your equity and funds 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.

This quarter, Telemet added Portfolio Composites to the Orion Advisor and Tamarac links. Now composite portfolios - with transaction-based performance - may be compared to benchmarks (we had previously linked these composites in SS&C Advent and Black Diamond). We always are adding portfolio management systems integrations - so ask if yours is linked. These links are seamless. They let you create great portfolio analytic reports for your clients and prospects. Our clients see these reports instantly - no need to wait overnight; they appear within seconds on the desktop to be printed, viewed, or downloaded into spreadsheets.

## Put/Call Ratios on reports and price pages

Put call ratios are calculated for every equity and now are shown as a custom column or in a report.

The put-call ratio is a popular tool use to gauge the overall sentiment in the market. The ratio measures how many put options are being traded relative to call options.

if the put call ratio is below 0.75 and decreasing it is usually considered a bullish indicator, if it above 1.0 and increasing it is considered a bearish indicator (since more investors buy calls than puts). As a reminder the put-call ratio is calculated by dividing the number of traded put options by the number of traded call options.

For future reference we will be adding the history of the put call ratio as a chart overlay. Stay tuned.

## Institutional Ownership - more data on custom pages

Some of our clients use a stock's institutional ownership as a driver of a stock's price. To get an indication of trend we have added institutional ownership from the previous report period. This along with to the institutional ownership for the current report period lets you see the change in ownership from period to period. Change in institutional ownership suggests a change in institutional sentiment.

## S&P estimates update dates

S&P estimates of sales and EPS are updated on an irregular basis; some estimates are updated more frequently than others. We have added data to custom pages and the S&P estimate reports - the S&P last update dates indicate when the yearly and quarterly estimates of eps and sales were last revised.

**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.**

## Did You Know?

### Telemet is educating the next generation

We have been serving universities since 2003 with the Telemet Finance Lab. This lab's platform has the same high functionality as Telemet Orion with reorganized navigation. Students quickly engage with the lab's platform and the Lab functionality greatly helps them understand the fundamentals of investments. Telemet also provides the curriculum to incorporate the lab into coursework, and students may take a Telemet supplied exam to certify their proficiency with the platform. The platform's access to financial data is quite deep so faculty also find it a great research tool.

Please recommend the Telemet Finance Lab to your alumni association/business school or to share with us any university program that you would like to us to contact directly.

Please reach out to Rosie Vergilio, our University Director, for more information. Call 800-368-2078 or email [rosie@taquote.com](mailto:rosie@taquote.com)

## SS&C Advent Moxy Update

### Our Moxy platform news

Here is a clarification on Advent Moxy documentation.

As a reminder, 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.

## Webinar

### Year in Review - Telemet

Our last Webinar was "Year in Review - Telemet". We reviewed last year's enhancements.

The Webinar was held in late February 2019 and was recorded so you can gain access even if you missed it.

Here is the link to past 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](mailto:support@taquote.com).

## Important Links

- [Telemet Orion Latest Version v8.2.05.26 dated 03/26/19](#) - Select Telemet Orion software
- [Televista for Advent Axy v2.5.31 dated 1/7/19](#) - 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
- [December 2018 Newsletter](#)

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