



## GREAT PERFORMANCE. GREAT PRICE.

Welcome to the 3rd Q 2018 Newsletter. Here is news on our new team member that is covering the university marketplace and enhancements to the platform including yield curve access, links to Tamarac and new data on custom pages.

[Visit our Website](#)

### Message from the President

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!

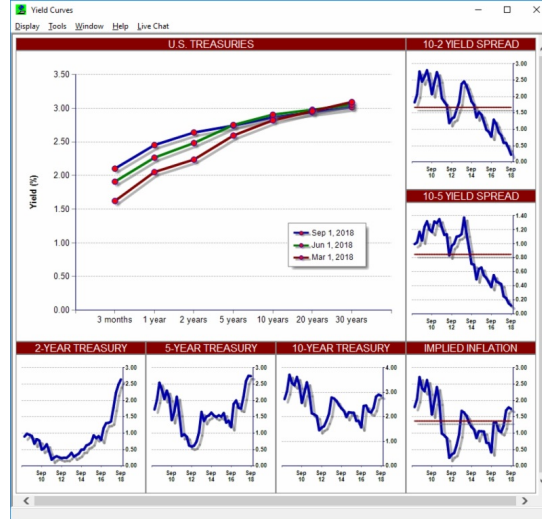


## Recent Telemet Enhancements

### Yield Curve Enhancements

The yield curve traces the yields on varying US treasury maturities, from the shortest -- three months or less -- out to as far as 30 years.

You can follow all these on Telemet Orion. The Yield curve is accessed by selecting "Display/Fixed Income/Yield Curves" and you will see a screen like the one below. Note the upper right chart is the 10-2 year spread. Take a look at the new yield curves when you get a chance so you will be on top of events if the yield curve further flattens.



## Tamarac

Tamarac provides portfolio and client management software. We have just 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.

A simple point and click brings Tamarac portfolios into Telemet's analytics. Tamarac clients get instant, powerful, easy to use reports that show what drives portfolio performance. There is no need to wait overnight for reports, since they appear within seconds on your desktop.

Tamarac joins SS&C Advent APX and Axyx, Black Diamond, Indata, Orion Advisor, Schwab Portfolio Center and other portfolio accounting packages with links to Telemet portfolio analytics.

## Portfolio Groups added to Black Diamond Portfolio Analytics

As mentioned above your Telemet has links to Black Diamond. To enhance the reporting capabilities, Telemet added "Portfolio Groups" to the portfolios that Telemet can analyze with its attribution and contribution software bundled into its platform. These reports also include "As of Date" reports.

Links to the other portfolio accounting packages (such as APX, Axyx and Orion Advisor) already have support for "groups" and "families".

## Total Returns on Funds are new data on reports and pages

With stocks, you can display total returns for 7-days, 30-days, 90-days 180-days, 360-days, WTD, MTD, YTD last quarter, etc. Some of you asked that we add the total return numbers for funds to our custom pages. We have done so for funds reporting these returns. In July we 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.

## Historic and Intraday Charts enhancements

Moving averages added on volumes and commodity channel technical indicators were added to the newest release.

Access to Economic Charts (such as GDP, Employment, etc.) has been simplified. Now a pull down menu for access to economic time series.

## Cycle View Charts enhanced

When running a series of historic and intraday charts automatically (Cycle View Charts) the control, placement and size of the charts has been improved.

## Create pdf

As a reminder, with one click create pdf formatted reports from MS Excel. Thus a Market Report or Portfolio Report (such as those in our Spreadsheet Library) can be put in a pdf format with just one click. Its an easy way to create an up-to-date report for clients.

## Default Ticker Limit increased

Now up to 20,000 tickers can be followed on Telemet Orion. The previous limit was 10,000.

**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.**

## Announcing New Telemet Team Member

### Rosie Vergilio Joins Telemet as University Director

The Telemet Finance Lab for Universities takes students into the world of investments with "real-world platform" used by professional investors and traders. The Telemet Finance Lab helps students prepare for a future career in finance. The Telemet Finance Lab is integrated into investments courses and supports student managed funds. Moreover it offers faculty a robust tool for independent research. If you know of a school that would benefit from this, please contact Rosie Vergilio.

Rosie joined us to manage and grow the Telemet Finance Lab market. She comes to us with an outstanding career as a successful sales and marketing director. She has a BA and MA from Indiana University. She resides in Arlington Virginia.

Rosie can be reached at 800-368-2078 or email [rosie@taquote.com](mailto:rosie@taquote.com).

## Telemet Upcoming Trade Shows

### SS&C Deliver, AACSB, IAA Leadership and CFA Research

Telemet is exhibiting at three shows in September and one in November 2018 and we invite all clients and interested parties to come by and say hello.

Here is the schedule:

- SS&C Deliver, September 12-14, in Las Vegas, NV
- AACSB Annual University Accreditation Conference, September 23-25 in Washington, DC
- Investment Advisor Association Leadership Conference, September 26-28 in Dallas, TX
- CFA Equity Research Conference, November 6-7 in New York City, NY

## New Computer? Latest Version?

### Getting a New Computer?

Lucky you! if you are planning to get a new computer, make a replication file of your

### Are you Running the Latest Software Version?

Our latest Telemet Orion software is

Telemet Orion platform before you do the upgrade. All your settings, workspaces and displays then can be loaded immediately. Here is the [link](#) on how to do this.

v8.2.05.24. Get a copy [here](#).

## The Exchange and Advent User Group

### Expands Membership Focus

"AUG – The Exchange" was established in 1998. The Telemet team notes that this is a wonderful forum for the wealth and investment management community.

Originally established for Advent users, the forum now includes all investment advisor professionals - not just Advent users. The membership meets throughout the year with an annual conference and local group meetings. Members discuss their technology solutions in the highly-regulated investment industry. Focus groups meet and conference periodically to share tips, tricks, challenges and best practices related to a particular topic. Annual membership is about \$600. Telemet has participated in this forum over the years and thinks you will find it a useful resource. For more information go to <https://augtheexchange.org/>.

## Webinar

### Working with Financial Statements using Telemet

Our next Webinar will be "Working With Financial Statements". 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 deep financial and company information on the platform.

By attending this Webinar you are likely to enhance your knowledge of our research and company analysis features.

The Webinar will be held later in September and will be recorded for those that miss it. An announcement will be made later in September. Our last Webinar was on Fixed Income features in Telemet.

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](mailto:support@taquote.com).

## Important Links

- [Telemet Orion Latest Version v8.2.05.24 dated 9/05/2018](#)
- [Televista for Advent AxyS](#)
- [Televista for Advent APX](#)
- TeleFlash Proprietary Data Publisher v1.3.3.8
- [June 2018 Newsletter](#)

Client Service Team | 800.368.2078 | [support@email.com](mailto:support@email.com)