

TELEMET QUARTERLY NEWSLETTER SEPT 2021



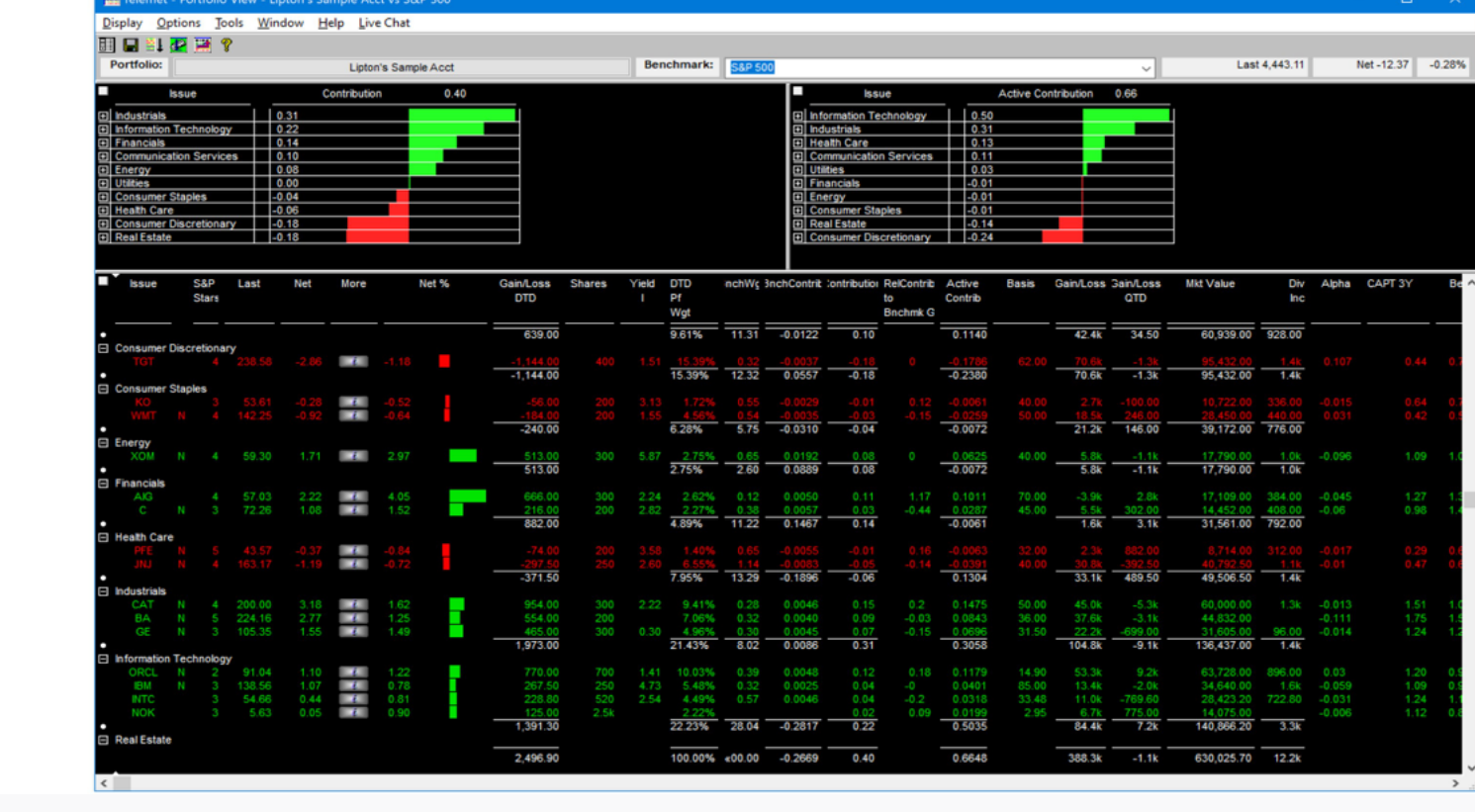
Message from the President

Greetings to All,
 Portfolio View is one of Telemet's most popular displays. In this newsletter we'll review what you see and how to access it. Another popular display is our As-of-Date Reports and we review this too. Also take a look at our economic charts, in this newsletter we'll show you how to get to them quickly and easily.

Telemet has added new software engineers to our team and two new team members in Client Services - there is more on their backgrounds in this newsletter.

Thank you for your business.

Regards,
 Fred Parsons, CEO



Portfolio View Information

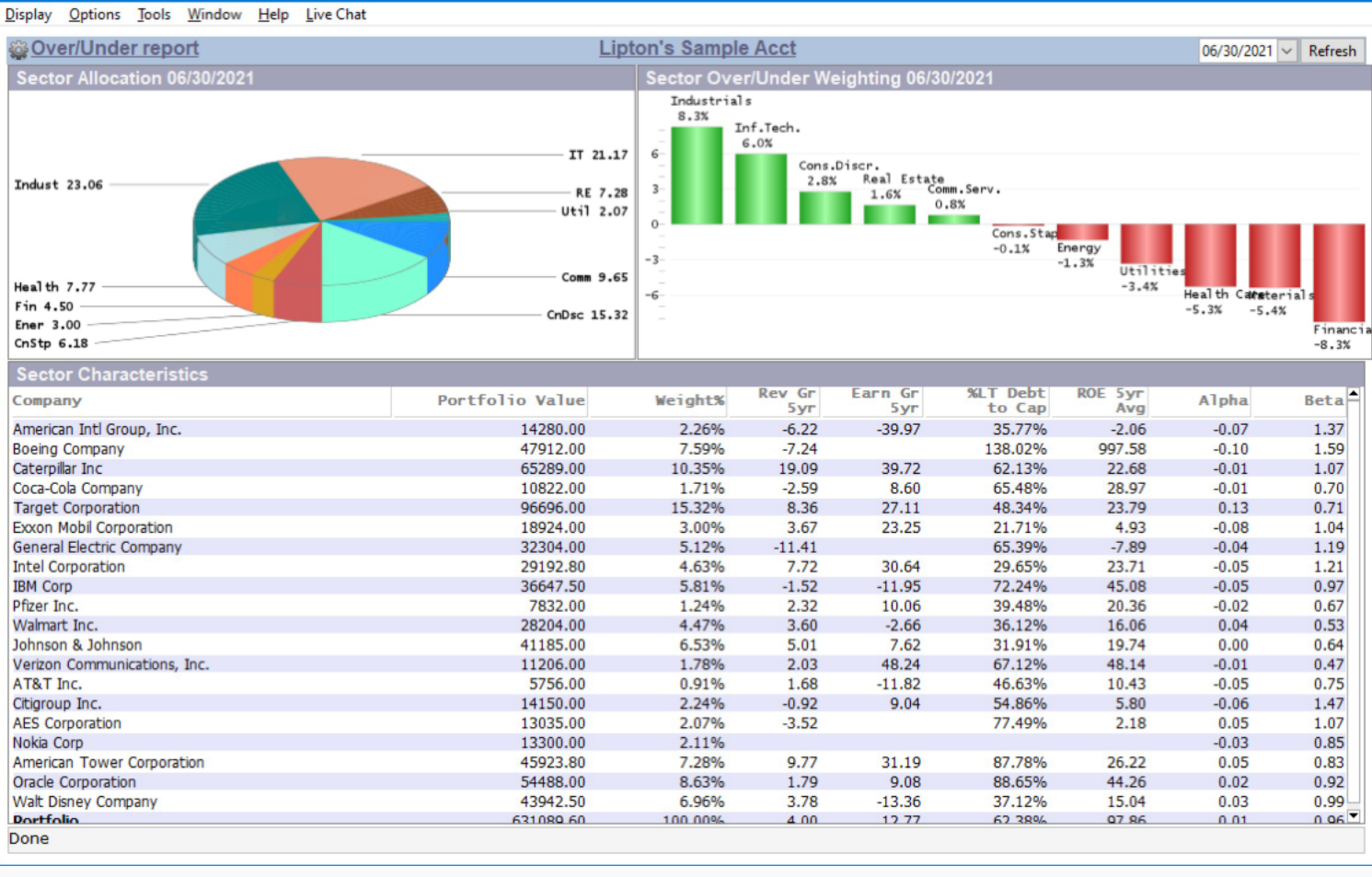
The Portfolio View shows how a portfolio compares to a benchmark throughout the day. Just about everything you need is shown here. At the top left of the page you see a chart of the contributions by sector. At the top right of page, you see the active contribution by sector. Use the "+" next to the sector to see the holdings in the sector. On the bottom of the display you see the individual holdings (which you can see by sector if desired). Shown are the last price, net change, gain and loss for the day the holdings, active contribution and other data. The benchmark and individual portfolio are selected at the top of the display.

To access Portfolio View, go to Display/Portfolio Analytics/Portfolio View and follow the prompts.

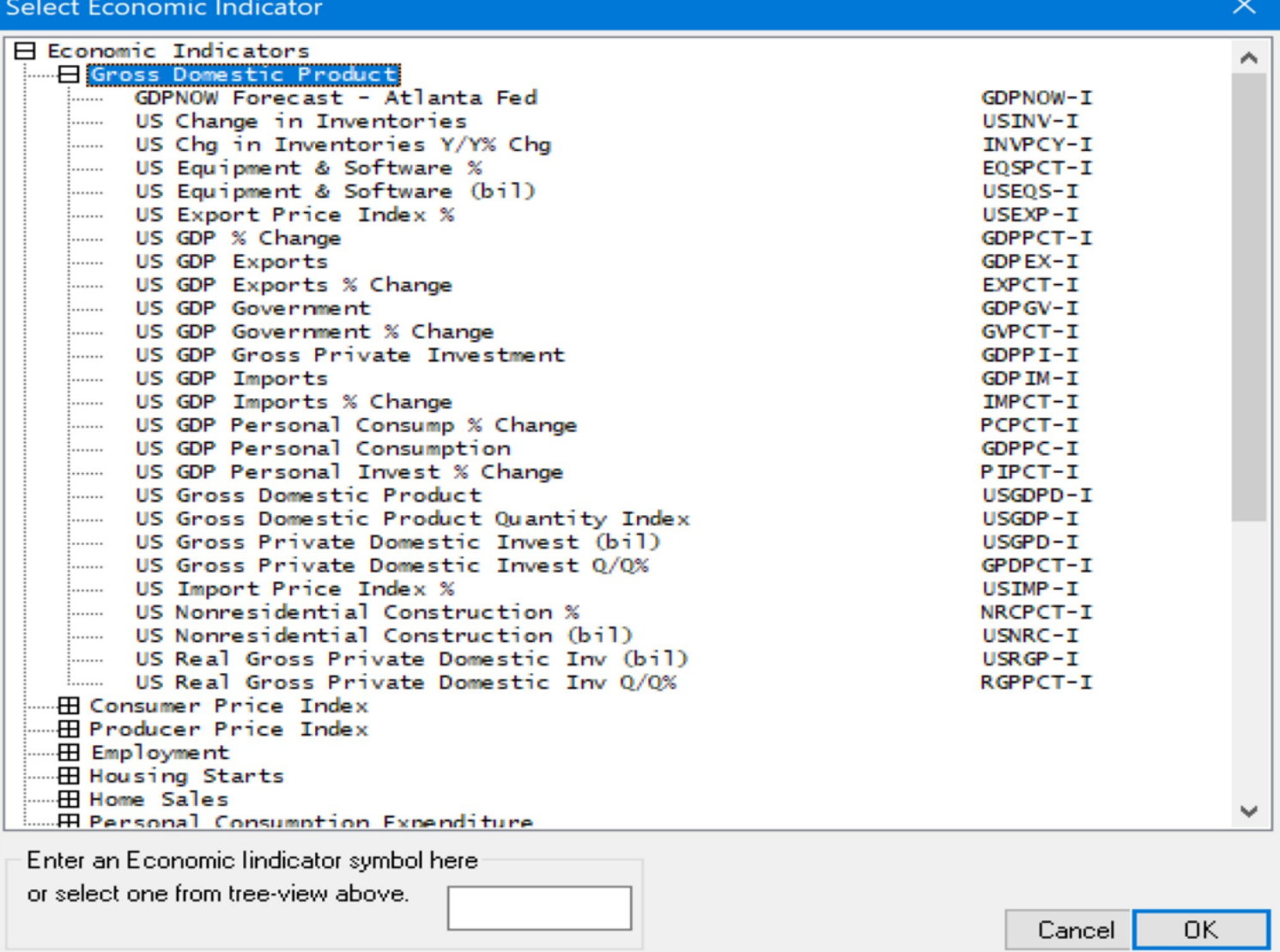
The best way to get the portfolio data for the Portfolio View display into your Telemet Orion platform is to link to your portfolio accounting software. We link seamlessly to most portfolio accounting packages, such as Advent Axyx, APX, BlackDiamond, Orion Advisor, Tamarac and others. Call our support team to find out how to make the link.

As-of-Date Reports

Once you have portfolio data linked to your Telemet Orion platform you can run reports as of end of quarter or year on the portfolio. They are called "As-of-Date Reports" and are accessed by selecting Display/Portfolio Analytics/Portfolio As-of-Date. Follow the prompts to get the report you want. There is more information on Portfolio View and As of Date in Volume III of our system manuals. See our website under Support for access to these. An example report is shown below.



For help on these pages, please call our client service team 800-368-2078 or email support@taquote.com.



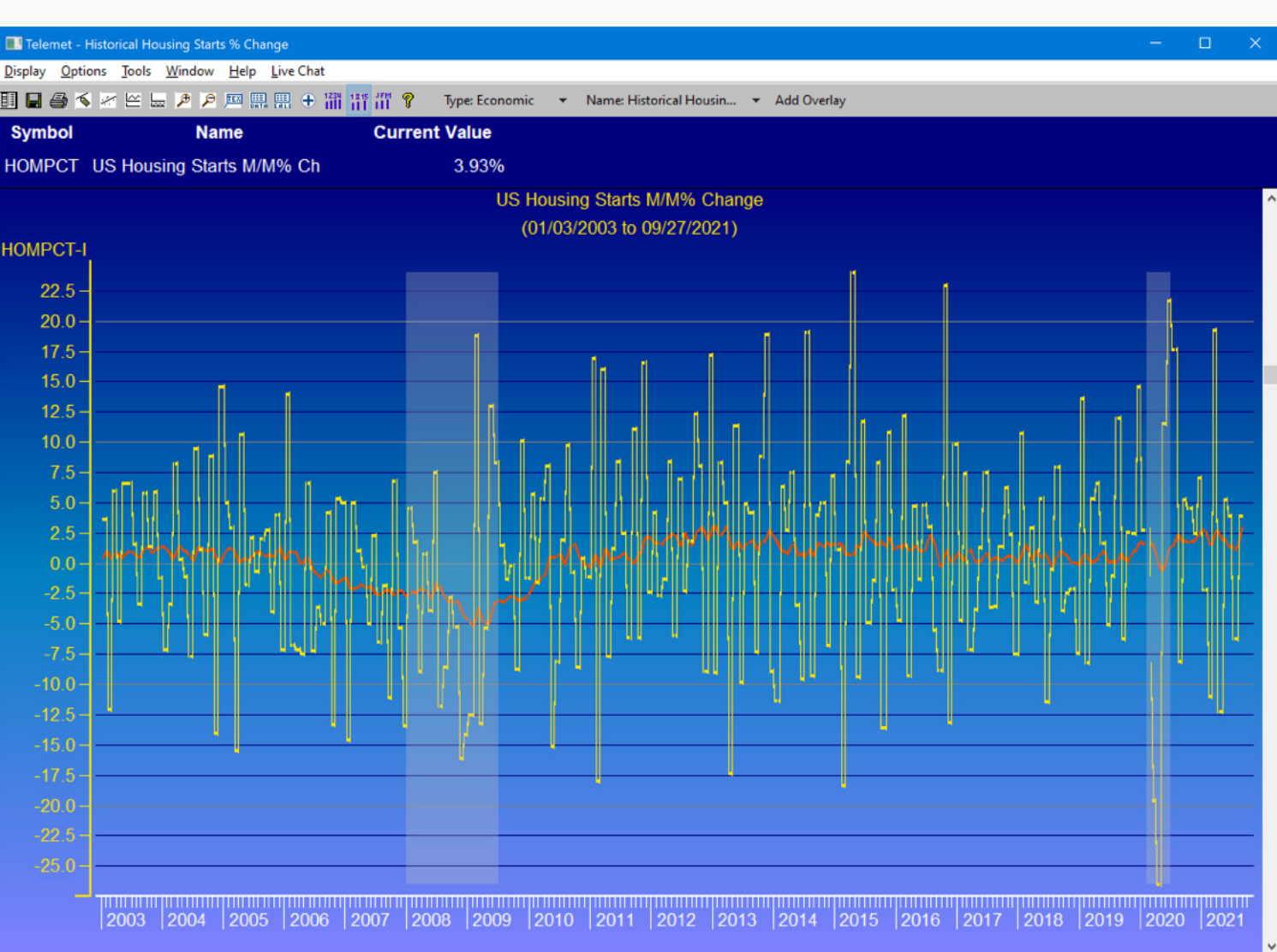
Economic Charts

Over 200 economic statistics may be charted on your Telemet Orion platform.

Access the selection menu for these charts by using Display/Charts/Economic Indicators.

You will see a series of folders displayed like the one shown above. Each item has a "+" sign near it and clicking on the "+" will show the individual charts that may be seen. Just click on the individual selection and the chart appears. An example economic chart is shown below, it is US Housing Starts M/M percent change. it is listed in the Housing Starts folder. See it listed if you press the "+" key next to the Housing Starts folder.

For help on gaining access and getting insights into these data, please call our client service team 800-368-2078 or email support@taquote.com.



New Client Service Team Members

We have added two new Client Service team members and we wanted you all to know how happy we are that they joined our firm.

Kirby Hartley and James Moore both have finance educations; Kirby is a candidate for a Master of Science in Finance from Purdue and James has a Master of Science in Financial Econometrics from Johns Hopkins. Please say "hello" to these new team members! For reference Kirby can be reached at kirby@taquote.com and James can be reached at james@taquote.com.

Tutorials and Important Links

We offer webinars on various features of Telemet Orion. To get help to see this webinar or to review past webinars which contain valuable orientation materials on charts, spreadsheets, news and attribution, call/email or chat with a member of your client service team, 800-368-2078 or email support@taquote.com.

- [Telemet Orion Latest Version v8.2.06.7 dated 9/4/20](#) - Select Telemet Orion Latest Version
- [Televista for Advent Axyx v 2.5.4.0 dated 9/4/20](#) select compatible software
- [Televista for Advent APX v1.5.31 dated 9/4/20](#) Select compatible software
- [Telemet QuoteService Standard Version v1.0.3.0](#) - Select compatible software
- [TeleFlash Proprietary Data Publisher v1.3.3.8](#) - Select compatible software
- [March 2021 Newsletter](#)
- [June 2021 Newsletter](#)

