GREAT PERFORMANCE. GREAT PRICE.

Welcome to the 2nd Quarter 2019 Newsletter.
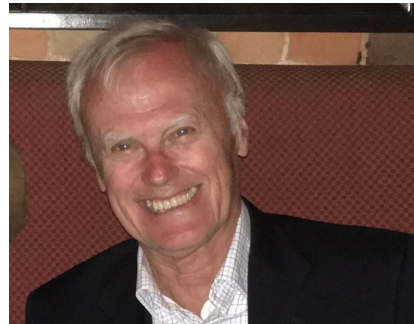
Visit our Website

Message from the President

Here is the latest news on Telemet.

We are working to ensure that our platform enhances your workflow and creates great security-level attribution reports.

Fred Parsons, CEO

Please send me an email with comments!

Enhancement News

Security-Level Attribution

Security-level attribution is a must for institutional managers and becoming so for HNW clients too.

Telemet has security-level attribution for equities, ETFs and funds. You see performance, sector analyses, and relative returns on your equity, ETF and funds portfolios compared to a chosen benchmark. You also see sector under and over weightings, which sectors worked and within each sector, which securities worked over any time period of your choosing.

Telemet's security-level attribution solves big privacy and off-site confidentiality issues. It runs on your desktop and no client files are sent to Telemet and none are sent over any third party communications channel. Confidential client data never leave your premises and the attribution reports are run in seconds. This is a distinctive and important property of our attribution module. Further, you are not burdened by waiting overnight for these reports - you have them immediately.

As an additional benefit Telemet offers a large number of benchmarks to choose from such as various S&P and Russell benchmarks. Telemet recently added "custom" and blended benchmarks to attribution too.

To make the reports easy to run, portfolios from Advent APX, Axys, Black Diamond, InData, Orion Advisor, Portfolio Center and Tamarac have seamless, built-in links. With a single point and click, you

can see attribution reports on your individual portfolios, composites, families and groups. You may download these reports to spreadsheets, just review them on line or print pdfs. We are always adding portfolio management system seamless links - so ask if yours is seamlessly linked.

Call or email us for more information.

News and price limits emails

Telemet has enhanced the email interface for price and news alerts. Many times you may not be near your Telemet Orion workstation but may want to know when a price target has been hit, or maybe when a certain company has news.

Inside the price limit alert module there is an email function so that you can email a price limit alert to any email address. The same function is available for news.

So for example, if you want an alert on your smart phone if a stock has news, you can set it up on your Telemet Orion workstation and see it on your smart phone.

For help setting them up, please contact client services.

Query building (search screen) enhancement

A new feature in query building (search screen) lets you search on expressions built from existing field values. The expression's values can be searched as if it were an existing field. We will be adding these expressions so that they may be displayed in the search screen results window.

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.

Webinar

All about Workspaces Webinar

Our last Webinar was "all about workspaces". Workspaces are visually appealing collections of windows on your PC. The Webinar reviewed how to create your own workspaces and how to modify the ones that come premade with your Telemet Orion Platform. The Webinar was recorded so you can review this material even if you missed the Webinar. Here is the link to past Webinars Webinar.

Our next Webinar will be a general training review and an announcement will be made shortly about it.

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 v8.2.05.26 dated 03/26/19 - Select Telemet Orion software
- Televista for Advent Axys v 2.5.34 dated 422/19 - Select compatible software
- Televista for Advent APX v1.5.25 dated 2/26/19 - 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

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