



GREAT PERFORMANCE. GREAT PRICE.

Welcome to the 3rd Quarter 2020 Newsletter.

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Message from the President

Greetings to All,

The news this quarter has been dominated by two themes. The fall election and the pandemic. As of today we are through neither of them!

The good news is that vaccines that have been developed and tested in trials in what only can be termed "record time". This, among other factors, has given rise to optimism that should be tempered.

It will be many months before the entire US population is vaccinated. There are several hurdles, reticence to get vaccinated, distribution issues and storage requirements are among them. One factor which is a "known, unknown" is the long term efficacy of these vaccines. Do they provide protection for three months, six months, a year? If the protection lasts it is good news, but at this writing, we just don't know, no data are available because of course, the pandemic is new and the trials have not lasted that long.

So we are not out of the woods, and there will be more economic stress to come this winter.

All that being said, I do hope you and your loved ones are—and continue to be—safe and well.

Fred Parsons, CEO

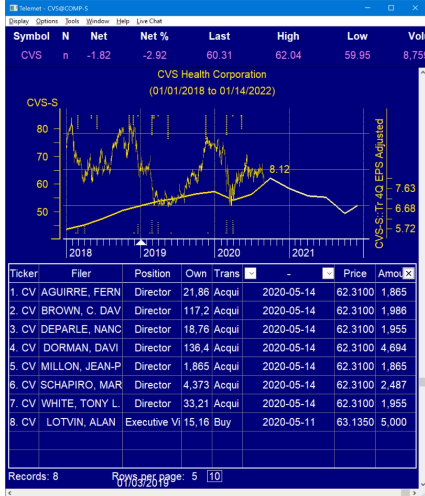


Telemet News

Search, Rank and Screen

Searching, ranking and screening helps identify investment opportunities.

Searching is easy yet powerful with Telemet. Results are shown in seconds! With search, identify stocks with high yields,



low p/e, market cap, industry constraints and/or growth at a reasonable price.

Telemet helps you get started with 'predefined' search templates and tools to help you create new ones. Searches can be saved for easy recall. And your variable selection is virtually unlimited. Select from over 500 variables, including fundamental company data, real-time and historic prices, ratios, earnings estimates, yield and dividends, industries, sectors, market cap, ESG data and many, many more. Create unique relationships among variables and search on these.

After you have completed a search, you can see the results ranked and sorted. Sort and segregate results by industry or other variable. It is all done with the click of the mouse.

For help on search rank and screen you may review our video webinar - link below.

<https://5c38f86b45e72446d2d0-cb51cb7c20f76bb0af9bccd9fd862169.ssl.cf5.rackcdn.com/Wix%20Files/Webinar/SearchScreenWebinar2-8-17.wmv>

Alternatively, please call our client service team 800-368-2078 or email support@taquote.com.

Ticker	Company Name	Industry	Market Cap	Price	Volume
CVS	CVS Health Corporation	Pharmaceuticals	150.00B	60.31	8,758
WAL	Walgreens Boots Alliance	Pharmaceuticals	100.00B	100.00	100.00
AMZN	Amazon.com	Technology	150.00B	300.00	100.00

Links to Portfolio Management Platforms

Telemet seamlessly links with portfolio accounting platforms, including Advent Software's Axys and APX, Black Diamond, InData, Orion Advisor, Schwab and Tamarac. What benefits do you get by doing this? Here are a few.

1. Once you have the links in place, Telemet gives you time-weighted, portfolio analytics - what sectors worked and what stocks worked compared to popular benchmarks.
2. You can characterize a portfolio compared to a benchmark for its yield, market cap, p/e and other metrics.
3. You also can price portfolio or master list in real-time and characterize its price momentum, equity fundamentals or other variables.

Please let's discuss Telemet attribution and contribution and linking in your portfolio management accounting platforms. And don't forget Telemet links to OMS also! Linking to OMS a is perfect for rebalancing frequently in volatile markets.

Should you have questions or need more information on these or any other function, please contact support@taquote.com

Sustainability Metrics (ESG) at your fingertips

ESG metrics should be part of your investment risk-mitigation assessment and they also could be used to illustrate sensitivity to sustainability issues for clients and prospects.

Sustainability is measured in three to four distinct categories. The categories include: environmental, social and governance (ESG); often the social category is split into community and employees.

Since ESG metrics among evaluators is widely known to have low correlations, we have decided to present consensus sustainability data. We offer screening on these metrics and we compare ratings or rankings among stocks in your portfolios. Thus, when selecting between two somewhat "equivalent" investments, ESG rankings might become the deciding factor.

Please do call us 800-368-2078 to get a complimentary trial of this important service.

Webinar

About Our Webinars

Our last Webinar "Workshop - Telemet Refresher" provided an overview of the easy-to-use Telemet Orion integrated investment platform.

Point and click MS Excel links on Telemet were reviewed also to show how to get data into a spreadsheet. Templates reviewed illustrated portfolio analyses, margin analyses and economic outlooks. The Webinar was recorded so you can review this material if you missed it.

Our next Webinar on will be coming up in January 2021. Look for an announcement.

To get help to find or 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 support@taquote.com.

Important Links

- [Telemet Orion Latest Version v8.2.06.7 dated 9/4/20](#) - Select Telemet Orion software
- [Televista for Advent Axys v 2.5.40 dated 9/4/20](#) select compatible software
- [Televista for Advent APX v1.5.31 9/4/20](#) 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 2020 Newsletter](#)

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