



## GREAT PERFORMANCE. GREAT PRICE.

Welcome to the 1st Quarter 2020 Newsletter.

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### Message from the President

Greetings to All,

In this issue we review new services on Telemet Orion, our flagship investment platform.

But before we discuss our latest enhancements, I want to talk about the strange turn of events since my last message to you. The Covid-19 pandemic has presented us with far-reaching social disruptions and challenges that I would have never anticipated, and it has revealed the inadequacies of many of our institutions. At the end of this scourge, we will likely find ourselves in a country that is dramatically changed. As we respond to the new realities, we will be required to be nimble and creative.

I want you to know that at Telemet, the safety of our teams and the continuity of our services remain our highest priorities. We implemented our disaster plan several weeks ago, and our teams are working remotely, on a completely integrated basis. Even under the unusual circumstances and work arrangements, the company remains vibrant, creative and focused on providing you with the industry's best performance and value.

I do hope you and your loved ones are—and continue to be—safe and well.

Fred Parsons, CEO

Please send me an [email](#) and let me know how you are doing!



## Enhancement News

### Working Remotely

Should the day come when you must work remotely, Telemet's got you covered.

In times like these—more than ever—you need to have Telemet's real-time market data at your finger tips where ever you are working—in the office or at home.

Telemet can work where ever you decide to work. Your laptop, home desktop or notebook computer can show you exactly the same screens that you are so used to in your office.

For help getting set-up contact support. Email [support@taquote.com](mailto:support@taquote.com)

## **International end-of-trade-day price and dividend data**

Telemet's end-of-trading-day pricing application is an effortless way to price portfolios in accounting platforms. It seamlessly links to your accounting platforms to save time, effort, and minimize errors. It is also easier on your budget than other services which typically "pay \$\$ by the price".

And Telemet provides international dividends through our global end-of-trading day price database. You can download as many dividends as you need for your accounting system's trade blotter for an entire month.

All these international services are available to you, as a valued Telemet client, at a great price. Another example of great performance, great price.

For help on international price and dividend access, please email [support@taquote.com](mailto:support@taquote.com).

## **Sustainability Metrics (ESG) launching soon**

Telemet announces that its new sustainability metrics will be accessible in just a couple of weeks. These metrics will illustrate to your clients and prospects your sensitivity to sustainability issues.

Note that our new metrics will consist of aggregate data which provides you with a consensus of sustainability vendor's scores. We elected to provide our sustainability metrics using aggregate data because our research shows that many provider scores have poor correlation coefficients; by sourcing our metrics from a number of providers, you will be assured of a fairer representation of these data.

In business and investor worlds, sustainability has become to be viewed and measured more expansively in three or four distinct categories. Typically the categories include: environmental, social and governance (ESG); often the social category is split into community and employees.

Environmental disclosures include greenhouse gas emissions, water usage, waste disposal. Community disclosures include community development, human rights and product issues. Employee disclosures include compensation and benefits, diversity and labor rights and health, safety and training. Governance disclosures include ethics, board diversity and composition, shareholder rights and transparency and reporting.

Telemet's new sustainability functionality will provide you with the ability to screen metrics and compare ratings or rankings among stocks in your portfolios.

And, you will be able to "drill down" to company specific sustainability information about individual stocks in your portfolios - [click here](#) for more information..

## **Mutual fund data enhancements**

Telemet now has a link from custom market watch pages to mutual fund data. This enhancement allows you to quickly access fund details such as fund description, objectives, strategies, net assets, turnover rates, performance, payouts, performance and distributions. Use the 'More' column, a double click action or open 'Key Stats' to see the fund details. Additionally we have added a feature to our fund reports that enables you to see a fund's largest holdings.

Call or email us for more information or a free trial of our mutual fund service.

## Webinar

### About Our Next Webinar

Our last Webinar was "Portfolio as-of-date reports". As-of-date reports provide a snapshot of a portfolio's financial metrics and price data as of a selected date - such as the end of the month or quarter. These reports are handy for client handouts and management meetings. The Webinar was recorded so you can review this material even if you missed the Webinar.

Our next Webinar will be April 2nd 2020 at 2 PM ET on "Working Remotely with Telemet". In these times many of our clients are working from remote locations, and this Webinar will help you decide how to set up your remote work space so your screens look and feel as they do at your office assuring you can stay in touch with the markets.

Within the next few days we will provide you with information about signing up for this Webinar. We hope you can join us!

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](mailto:support@taquote.com).

## Important Links

- [Telemet Orion Latest Version v8.2.06.2 dated 12/10/19](#) - Select Telemet Orion software
- [Televista for Advent Axys v 2.5.38 dated 1/7/20](#) select compatible software
- [Televista for Advent APX v1.5.30 1/7/20](#) 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
- [December 2019 Newsletter](#)

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