

TELEMET QUARTERLY NEWSLETTER MARCH 2022



Message from the CEO

Greetings to All,

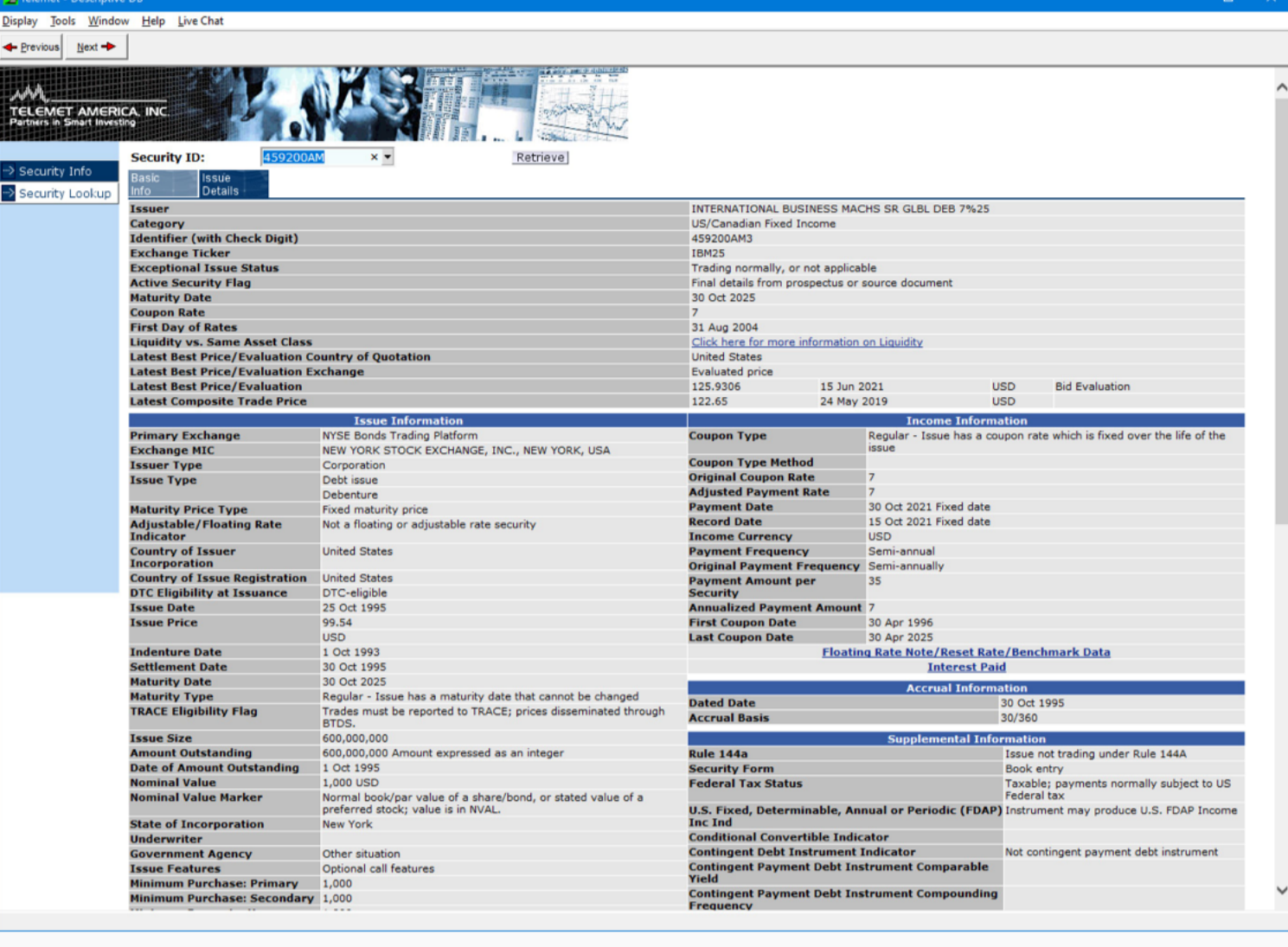
In this newsletter we'll review services from Telemet that might interest you. We do this because many are unaware of the broad range of services available. So do read up on them - complimentary trials of all of them are yours for the asking.

We'll also review attribution and benchmarks that you can use to measure your portfolio's performance. And we seamlessly link your portfolios to Telemet attribution because we partner with many popular portfolio management systems.

Further, Telemet's links for order management systems (OMS) make trading and real-time rebalancing easy. We continue to add vendors to those with links to our data.

I want to thank you for your business and wish all of you a safe and comfortable 2022.

Regards,
Fred Parsons, CEO



Bond Research on Telemet

A new client sometimes brings bonds they own to your attention. Naturally you and your back office must know more about the bonds including coupon terms, payment dates, call provisions, ratings and other details. Telemet offers a service called "Bond Descriptive Data" to fill your need. The database includes over 2 million corporate, municipal and government bonds. And you can try this service for a month on us! It is less than one tenth of the cost of the terminal used by many for bond research. So why not take a look at this?

And since we've mentioned this, we also should call your attention to some other great services available on your Telemet platform. Here are some of them:

- S&P Estimates - Earnings & revenue estimates, recommendations, target prices and lots more.
- Dow Jones News. - DJ Jones moves markets so stay up to date anywhere with the web based platform.
- On and off-the-run treasury prices and muni yields - with riskier assets losing favor, treasury bonds become more interesting.
- CFRA Stock Reports - Independent research on equity investments.
- ESG Rankings - Get consensus scores and reports on US equities.
- Insider trades and institutional holdings - comprehensive reports on buys and sells.
- Real-time futures prices, bids, offers and open interest - with commodity markets affecting stocks, stay up to date with these data.

For a more complete list, [click here](#).

Links to Order and Portfolio Management Systems

Telemet seamlessly links to most popular order and portfolio management systems.

For order management systems the links are important because -

- you can rebalance on current prices not last night's close.
- you can trade more efficiently with current prices.

For portfolio management systems the links are important because -

- you see your portfolios in Telemet with current prices.
- you save fees by populating your system with Telemet dividends, prices, and security information.

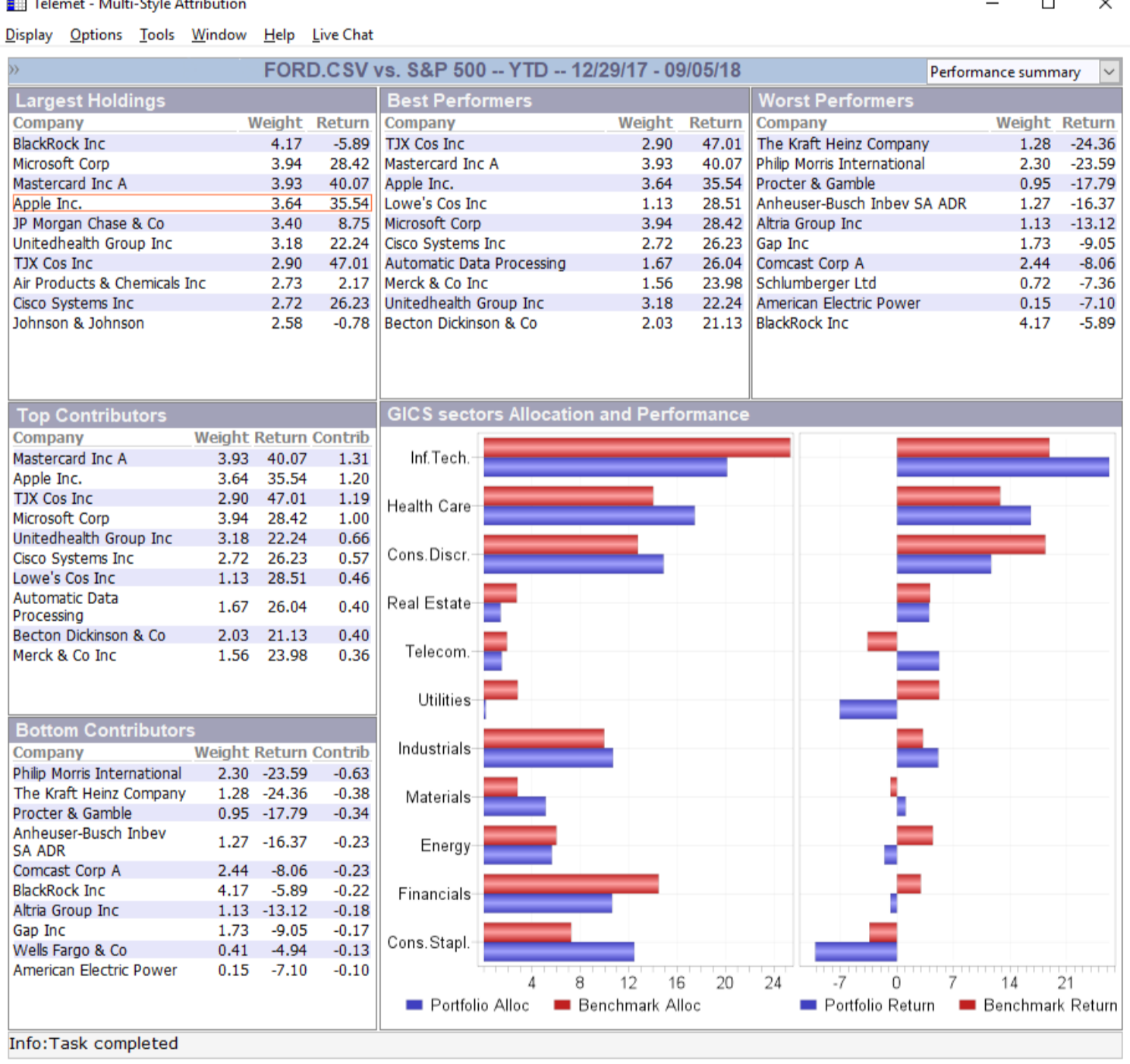
Attribution with Benchmarks - S&P and Russell

Telemet's attribution offers popular benchmarks for performance comparisons and breaks down this into sector allocation and stock selection effects. The official S&P benchmarks include the S&P 500, the S&P 500 Growth and Value subsets, the S&P 500 Sectors, the S&P 100, the S&P 400 & 600 along with Growth and Value subsets, the S&P 1000 and S&P 1500.

The iShares Russell Benchmarks are based on the performance of the Russell iShares ETFs. The iShares benchmarks available included iShares Russell 1000, 1000 Growth and 1000 Value. In addition, the Russell 2000, 2500 and 3000 iShares along with Growth and Value subsets can be used.

Telemet also offers the official Russell Benchmarks. The official Russell Benchmarks require a subscription from Russell. In addition to the benchmarks described above, Telemet offers its own 500 "equal weight" benchmark and if you prefer, you may construct and use your own custom benchmark.

Any of these benchmarks are accessed by selecting "Portfolio Analytics" then "Multistyle Attribution" from the "Display" menu item. Follow the prompts to get the attribution report that you want. Please contact Telemet Client Services (call 800-368-2078 or email support@taquote.com) for more information and guidance on accessing any of these benchmarks.



Please keep Your Telemet Software up to date

It is important to keep your Telemet software up to date to address bug fixes and get the latest features and enhancements. The latest version of Telemet Orion is 8.2.06.8 dated 10/4/2021. You can find which version of Telemet you're running by pressing "Help" then "About" in any Telemet window.

Please contact Telemet Client Services for more information and guidance on upgrading your software.

Important Links

- [Telemet Orion Latest Version v8.2.06.8 dated 10/4/21](#) - Select Telemet Orion software
- [Televista for Advent Axyx v 2.5.40 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
- [June 2021 Newsletter](#)
- [September 2021 Newsletter](#)
- [December 2021 Newsletter](#)