

TELEMET QUARTERLY NEWSLETTER DEC 2023



Message from the CEO

Season's Greetings to All,

We continue our work on third party integrations. We are looking for beta testers to provide comments on our integration with Pershing NetX360. More on this below.

We are also in discussion with CSSI to provide data to their new Portfolio Management platform called "Portal+". More on that in a later newsletter.

In other news, we have finished the second phase of our national network upgrade. It improves the resilience and timeliness of our equity, options and futures data.

We appreciate your trust in Telemet and we look forward to continue serving you.

Fred Parsons, CEO



Portfolio Attribution with NetX360 portfolios

Telemet now has a beta version of a link to Pershing NetX360.

If you are a Pershing client please contact us (support@taquote.com) to set up a test of these new links. Once done, you will instantly see attribution and contribution portfolio reports for any period for any portfolio or group at the touch of a few keys.

Pershing NetX360 is a web-based professional workstation for investment professionals and RIAs. It provides tools to manage clients' accounts, deliver services and help develop new sales opportunities. Pershing NetX360 was developed by Pershing, a subsidiary of BNY Mellon.

Trade Order Management links to Telemet

Telemet Orion connects via a seamless link to popular trade order management systems.

Two of the most popular are SS&C Advent Moxy and Ridgeline OMS.

With either of these platforms, you see real-time last sale and bid/offer quotes on your trading screen. Rebalancing with current data is better than end of day especially in fast moving markets. And one more thing, these links are inexpensive compared to comperable links from other vendors such as Bloomberg or FactSet. Our clients using these links reportedly save thousands of dollars yearly.

To learn more, please contact our client support team - support@taquote.com or phone 800-368-2078.



Portfolio Accounting links in Telemet

Telemet Orion integrates with SS&C Advent APX/Axys, Orion Advisor, InData, Tamarac, Black Diamond and Ridgeline. Call us to see if your portfolio accounting system has a seamless link to Telemet. We are always adding to our list. The links provide portfolio managers with a streamlined way to manage their portfolios. At the touch of a few keys, you can instantly call up any portfolio or group and get attribution, contribution, as of date reports and many others down to the security level. Compare your performance with popular benchmarks to see over and under performance by sector or industry.

Email support@taquote.com or call 800-368-2078 for comments or questions.

New Version 8.2.7.6

The new version of Telemet Orion is v 8.2.7.6. It is downloaded from the Telemet website. See the link below.

Important Links

- [Telemet Orion Latest Version v8.2.7.6 dated 9/05/23](#) - 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 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
- [Mar 2023 Newsletter](#)
- [June 2023 Newsletter](#)

