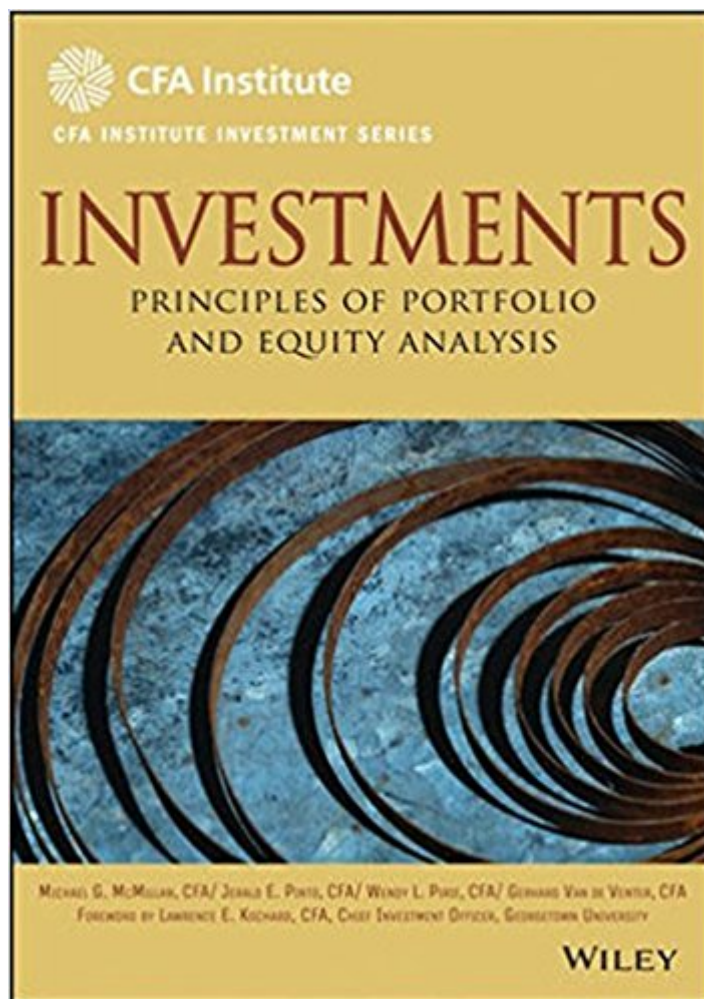


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# Investments: Principles Of Portfolio And Equity Analysis



## Synopsis

A comprehensive guide to investment analysis and portfolio management by an expert team from the CFA Institute In a world of specialization, no other profession likely requires such broad, yet in-depth knowledge than that of financial analyst. Financial analysts must not only possess a broad understanding of the financial markets-including structure, organization, efficiency, portfolio management, risk and return, and planning and construction-but they must also have a strong sense of how to evaluate industries and companies prior to engaging in an analysis of a specific stock. Investments: Principles of Portfolio and Equity Analysis provides the broad-based knowledge professionals and students of the markets need to manage money and maximize return. The book Details market structure and functions, market anomalies, secondary market basics, and regulation Describes investment assets and asset classes, types of positions and orders, as well as forecasting methodologies Discusses return and risk characteristics, portfolio diversification and management, the basics of both technical analysis and major technical indicators, and much more A companion Workbook, which includes learning outcomes, summary overviews, and problems and solutions sections is available and sold separately Investments provides readers unparalleled access to the best in professional quality information on investment analysis and portfolio management.

## Book Information

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Investment success requires both breadth and depth of knowledge of markets, industries, companies, and securities. Investment professionals must possess a broad understanding of the

financial markets to be able to judge opportunities and risks. They must also have the ability to evaluate in detail industries and individual companies to make sound judgments about individual holdings. As part of the CFA Institute Investment Series, *Investments: Principles of Portfolio and Equity Analysis* has been specifically designed to provide you with the knowledge you need to effectively and efficiently manage portfolios in today's volatile markets and uncertain global economy. With *Investments: Principles of Portfolio and Equity Analysis*, a distinguished team of senior investment professionals and leading business school authorities provides you with complete coverage of the most important issues in this field. Written with both the established and aspiring financial analyst in mind, this book will help you understand the mechanics of professional money management, including: Portfolio management Portfolio planning and construction Portfolio risk and return Equity security analysis and valuation Along the way, you will also become familiar with market organization and structure, security market indices, market efficiency, the types of equity securities, industry and company analysis, technical analysis, and a range of equity valuation techniques. And to enhance your understanding of the tools and techniques presented here, don't forget to pick up the *Investments Workbook: Principles of Portfolio and Equity Analysis*. This companion guide contains carefully constructed problems with detailed solutions as well as concise learning outcome statements and summary chapter overviews. Straightforward and accessible, *Investments: Principles of Portfolio and Equity Analysis* provides you with in-depth insights and expert advice on investment analysis and portfolio management, and the practical guide does so with a continuity of coverage that is critical to the learning process.

"This most thorough, carefully researched, and splendidly organized book constitutes the most relevant and up-to-date work on portfolio and equity analysis available. It provides masterly coverage of all aspects of portfolio analysis, including index construction, ETFs, modern portfolio theory, behavioral finance, technical analysis, and much more. It is a must-read for practitioners, for those preparing to enter the field of portfolio management, and will also be a standard in the university classroom." —•PHILIP FANARA Jr., CFA, Morgan Stanley Foundation Professor of Finance, Department of Finance, International Business, and Insurance, School of Business, Howard University "Investments: Principles of Portfolio and Equity Analysis provides a timely and comprehensive guide to equity analysis and an invaluable guide for portfolio management. Anyone with more than a passing interest in portfolio and equity analysis will benefit from the study of this book." —•LAVONE F. WHITMER, CFA, Vice President and Investment Manager, Indiana Trust & Investment Management "The reader will learn how rigorous investment theory can be put

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•VICTORIA RATI, CFA, Investment Research Analyst

For the most part, this looks like a standard investment text. The major topics for a course on investments is covered. To be fair, any investment text you get from the past decade or two will likely have most of the same major topics. It is well-written and well-organized, which is helpful. In my opinion, there are two areas that this text adds value. First, the discussion on technical analysis is very good. Second, since this book has a 2011 copyright, some of the data is updated relative to older texts. This latter is my main reason for getting new finance texts. Therefore, if you are a finance newbie, you will benefit from this text. However, for intermediate or advanced finance students, you will likely have read other texts that cover pretty much the same topics. In my opinion, unless those texts are old (i.e., the data and research presented are dated), you likely don't need to consider getting this text or any other text on investments for that matter.

I borrowed this book from the library to learn more about personal investments. I am glad I did. I have learned so much! All "popular" investment books take one idea (that could be explained on one page) and blow it out to fill the whole book endlessly repeating themselves. In this book, I have learned something new almost on every page.

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I bought this book for my investment class, the book is very good. The content is well organized and issues are illustrated explicitly.

excellent

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