



Investments: Principles of Portfolio and Equity Analysis

By Michael McMillan, Jerald E. Pinto, Wendy L. Pirie, Gerhard Van de Venter

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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.

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Editorial Review

From the Inside Flap

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.

From the Back Cover

"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."

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"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 efficiently in practice."

—**JACQUES R. GAGNE**, CFA, CIPM, Asset and Risk Manager

"A great refresher of fundamental investment concepts that also covers advanced topics, the latest thinking, and best global practices in financial analysis and portfolio management. Having collected the wisdom of multiple authors from across the globe really sets this book apart."

—**VICTORIA RATI**, CFA, Investment Research Analyst

About the Author

MICHAEL G. MCMILLAN, CFA is Director, Ethics and Professional Standards in the Education Division of CFA Institute. Dr. McMillan joined CFA Institute in 2008 after more than a decade as a professor of accounting and finance at Johns Hopkins University's Carey Business School and The George Washington University's School of Business. He has a doctorate in accounting and finance from The George Washington University, an MBA from Stanford University, and a BA from the University of Pennsylvania. Dr. McMillan is a member of the CFA Society of Washington, DC and the East African Society of Investment Professionals.

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GERHARD VAN DE VENTER, CFA is Deputy Head of the School of Finance and Economics at University of Technology, Sydney. He was previously director, Curriculum Projects, in the Education Division of CFA Institute. He began his career in South Africa as a financial analyst and later as a dealer at the Bond Exchange, where he traded fixed income securities. He holds a PhD in finance from the University of Technology, Sydney. He is a member of CFA Institute and the New York Society of Security Analysts.

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