



# Mutual Funds: Portfolio Structures, Analysis, Management, and Stewardship

From Wiley



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An authoritative, must-read guide to making more informed decisions about mutual funds

Providing a balance of theory and application, this authoritative book will enable you to evaluate the various performance and risk attributes of mutual funds. It covers a broad range of topics, including understanding the advantages and disadvantages of mutual funds, evaluating stock/bond allocations within fund portfolios, assessing fund diversification risk, measuring fund returns and risk, and making fund buy/sell decisions.

While informative chapters combine clear summaries of existing research with practical guidelines for mutual fund analysis, step-by-step decision checklists guide you through the selection of various mutual funds.

- Puts the risks and rewards of mutual fund investing in perspective
- Skillfully examines how to select and evaluate the best mutual funds
- Outlines mutual fund service advantages and disadvantages
- Discusses the long- and short-term effectiveness of mutual funds

Covering major theoretical and management issues in mutual fund analysis and portfolio management, this book is an authoritative guide.

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## **Editorial Review**

### From the Inside Flap

Despite recent turmoil in the financial markets, the mutual fund industry continues to be one of the extraordinary growth stories in the history of American financial markets. In 1984, net mutual fund assets totaled \$370 million. Today, they are at \$10.1 trillion. A major reason for their popularity is that mutual funds provide even the smallest investors with investment performance and investment alternatives, objectives, and services traditionally reserved for institutional and large individual investors. However, mutual funds also have numerous shortcomings that call for fund stewardship of shareholders, transparency in disclosure, investor education, and investor-oriented regulation.

As part of the Robert W. Kolb Series in Finance, *Mutual Funds* brings together some of the finest minds in academia, investment management, and mutual fund management to provide the nature and important elements of mutual funds.

Covering major theoretical and management issues in fund analysis and portfolio management, it is an authoritative guide to understanding mutual funds and getting the most out of your investments in them. The authors first provide an overview of the nature, structure, and services of open-end mutual funds, introducing the characteristics of an open-end fund and how they compare to those of alternative investment vehicles. They then explain how the financial markets really work and how prices are set—offering some well-researched cautions about active versus passive portfolio management. The authors go on to discuss specific strategies for investing in mutual funds, making a strong case for index fund investing, and also compare the advantages and disadvantages of mutual funds versus exchange-traded funds (ETFs). The book concludes with a hard look at the recent scandals in the mutual fund industry and offers sound advice on how to evaluate whether the managers of the funds you own are truly acting as trustees of other people's money.

The open-end mutual fund offers investors a range of desirable features, including liquidity, diversification, professional management, and more. For anyone who wants to make more informed decisions about choosing funds, this collection of in-depth contributions will prove to be an essential guide.

### From the Back Cover

**Mutual Funds**

**Portfolio Structures, Analysis, Management, and Stewardship**

**John A. Haslem, Editor**

**Kolb Series In Finance**

**Essential Perspectives**

**Mutual Funds**

The Robert W. Kolb Series in Finance is an unparalleled source of information dedicated to the most important issues in modern finance. Each book focuses on a specific topic in the field of finance and contains

contributed chapters from both respected academics and experienced financial professionals. As part of the Robert W. Kolb Series in Finance, the goal of Mutual Funds is to provide you with an authoritative guide to making more informed decisions about this cost-effective investment vehicle.

Using a balance of theory and practical application, this book explores the approaches that will further improve, and lessen the hidden pitfalls, of mutual fund investing. Mutual Funds covers a broad range of topics, including understanding the advantages and disadvantages of mutual funds, evaluating stock/bond allocations within fund portfolios, assessing fund diversification risk, measuring fund returns and risk, and making fund buy/sell decisions. The expert authors put the risks and rewards of mutual fund investing in perspective, examining how to select and evaluate the best mutual funds, mutual fund service advantages and disadvantages, and the long- and short-term effectiveness of mutual funds.

A complete resource and authoritative guide, Mutual Funds will help make the often difficult fund decision process easier—and much more rewarding.

#### About the Author

John A. Haslem, PhD, is Professor Emeritus of Finance at the University of Maryland. He also served as the founding academic affairs dean and founding chair of the finance department. Haslem received the Panhellenic Association's "Outstanding Teacher Award" for his mutual funds course—the first in the curriculum of a school of business. His research has appeared in numerous leading finance journals, several books, and over 100 research articles with a primary focus on mutual fund analysis, regulation, and disclosure.

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