



A Guide to Fund Management

By Daniel Broby

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The fund management industry performs the professional management and administration of investment assets on behalf of its clients. The terms fund or asset management are used to refer to the management of all forms of institutional investment, as well as the collective management of the wealth of private individuals. As a result, it is a large and important financial industry segment. In 2010, the industry had some US\$62 trillion of assets under management, generating fee revenue of over US\$500bn.

In order to capture the revenue opportunity senior officers in fund management companies have to apply best practice and understand operational issues. This is not as easy as it sounds. They have numerous calls on their time and their core focus should always be investment performance. It was to address the resultant time optimisation dilemma that this guide was compiled.

This book gathers together accepted industry best practice, structure, operations and procedures. As a result, readers can spend less time rummaging through industry white papers and more time on the strategic direction of the firm.

The guide is up to date, which is something that immediately makes it more relevant than the multitude of papers and operational notes that senior management is confronted with. It aims to offer one stop shopping on how to run a firm, addressing such issues as:

1. The different approaches to fund management
2. Revenue models
3. Complex regulation
4. Legal structures
5. Best practices and how to implement them
6. Performance generation and persistence
7. Clear and concise operational descriptions and functions
8. How to make the firm client centric
9. Product development
10. The threat and opportunities from alternatives to mainstream asset management

In addressing these issues, this guide should assist directors, executive

committee, finance committee, investment committee, asset managers, and consultants in effectively managing, monitoring, and evaluating the operations of a fund manager.

The guide is written in plain English, which should prove refreshing to those daunted by the regulatory overlay. In that way it should also help senior officers ensure compliance with fiduciary and prudent investor responsibilities. The guide can also be used as an educational tool.

The following pages set forth typical structures used by fund management firms to build their business. It is written in a way that will help senior management maintain the consistency of the investment processes, something which is necessary to produce good long-term performance and hence success.

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A Guide to Fund Management By Daniel Broby Bibliography

- Sales Rank: #6425917 in Books
- Published on: 2010-08-06
- Dimensions: 11.57" h x 8.27" w x 1.02" l, 2.23 pounds
- Binding: Paperback
- 289 pages

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Editorial Review

About the Author

As a senior figure in the asset management industry, Daniel Broby is a champion of capital markets. His focus on high level principals, integrity and best practice underlie his professional success. Daniel built his career on the back of a strong grounding in finance theory. He has an MPhil in economics and an MSc in investment analysis. He was elected an individual member of the London Stock Exchange in 1990; is a Fellow of Chartered Institute of Securities and Investment; a Fellow of CFA UK; and a Visiting Fellow at Durham University. He was presented with the CFA Institute's Society Leader Award in 2006. Daniel has had a number of C level positions at the largest asset managers in Scandinavia and Russia. These include chief executive officer, chief investment officer and chief portfolio manager. His career, however, has revolved around the London market. He was a board member of CFA UK, and its predecessor, for over 10 years. Daniel's focus has always been active asset management. His success in investment performance was recognised by Morningstar who rated the flagship fund he managed for eight years with five stars. Daniel has pioneered a number of investment solutions. He introduced the first regulated hedge fund and pioneered structured products in the Danish market. He has launched various investment funds, including a number focused on frontier markets such as Africa. Daniel has written two highly recognised books on the profession and numerous articles for industry journals. He was commissioned by the Financial Times to write *The Changing Face of European Fund Management*. Daniel has also contributed to the body of financial knowledge by writing *A Guide to Equity Index Construction for Risk Books*. Securities & Investment Review observed that it explores in intricate detail the various workings of modern portfolio theory, choosing a benchmark, measuring risk and sampling and selection procedures. Professional Investor magazine opined that it rarely 'does a book genuinely represent a first in its field.'

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Catherine Hershey:

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Jeffrey Lambert:

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Nicole Montes:

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Cynthia Tso:

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