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# Global Investing Ibbotson

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Dual Momentum Investing: An Innovative Strategy for Higher Returns with Lower Risk

Bull's Eye Investing

Beyond Wall Street

Popularity: A Bridge between Classical and Behavioral Finance

The Current State of Quantitative Equity Investing

Single Best Investment

The Harriman Book Of Investing Rules

Bonds

Investments

The Equity Risk Premium

Creating an Investment Policy Statement

Expected Returns

The Intelligent Asset Allocator: How to Build Your Portfolio to Maximize Returns and Minimize Risk

Asset Management

The Art of Value Investing

Investing DeMYSTiFieD, Second Edition

Personal Finance and Investments

Modern Investment Management

Advances in Active Portfolio Management: New Developments in Quantitative Investing

The New Wealth Management

Global Investing

2017 Stocks, Bonds, Bills, and Inflation (SBBI) Yearbook

Asset Allocation: Balancing Financial Risk

Investment Markets

Venture Capital and the Finance of Innovation

A History of the Theory of Investments

The Intelligent Investor  
Investing Strategies for the High Net-Worth Investor: Maximize Returns on Taxable Portfolios  
The Global-Investor Book of Investing Rules  
Quantitative Investing for the Global Markets  
Probable Outcomes  
The Fundamental Index  
Investment Philosophies  
Portfolio Design  
Cost of Capital  
How to Retire Debt-Free and Wealthy  
Factor Investing and Asset Allocation: A Business Cycle Perspective  
The Intelligent Option Investor: Applying Value Investing to the World of Options  
Triumph of the Optimists

*Global Investing Ibbotson*

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## **STEPHANY MAHONEY**

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### **Dual Momentum Investing: An Innovative Strategy for**

**Higher Returns with Lower Risk** Jaico Publishing House

In *Bonds: The Unbeaten Path to Secure Investment Growth*, Hildy and Stan Richelson expose the myth of stocks' superior investment returns and propose an all-bond portfolio as a sure-footed strategy that can ensure results. The book is designed to educate novice and sophisticated investors alike and serve as a tool for financial advisers as well. It explains why bonds can be the right choice and how to use them to achieve financial goals. It presents a broad spectrum of bond-investment options, describes how to purchase bonds at the best prices, and most important, shows how to make money with bonds. The bond strategies

presented in this book are used by the wealthiest investors and financial advisers to maximize the return on their portfolios while providing security of principal. These strategies can help you determine how to use bonds in your portfolio and take control of your financial destiny. You'll be playing it smart while playing it safe. Silver Medal Winner, Axiom Business Book Awards (2008) Silver Medal Winner, Independent Publishers Book Award (IPPYs) (2008) Silver Medal Winner, Advertising/Marketing/PR/Event Planning Category, Axiom Business Book Awards (2008)

[Bull's Eye Investing](#) McGraw Hill Professional

An authoritative text on cost of capital for both the nonprofessional and the valuation expert -- now revised and expanded In endeavoring to practice sound corporate finance, there is perhaps nothing so critical, nor slippery, as cost of capital estimation. The second edition of *Cost of Capital: Estimation and*

Applications combines a state-of-the-art treatise on cost of capital estimation with an accessible introduction for the nonprofessional. This comprehensive yet usable guide begins with an exposition of basic concepts understandable to the lay person and proceeds gradually from simple applications to the more complex procedures commonly found in the marketplace. New features of the revised and expanded Second Edition include chapters on Economic Value Added (EVA) and reconciling cost of capital in the income approach with valuation multiples in the market approach, as well as expanded coverage of cost of capital in the courts and handling discounts for marketability. Cost of Capital remains an incomparable resource for all parties interested in effective business valuation.

*Beyond Wall Street* John Wiley & Sons

**HOW TO USE YOUR HUMAN ADVANTAGE TO OUTPERFORM ALGORITHMS IN THE OPTIONS MARKET** If you're a value investor who wants to get your money into the lucrative options market, forget about day trading, chart patterns, and market timing. This systematic book lays out a path to long-term wealth by taking positions on companies with real intrinsic value--the kind Ben Graham and Warren Buffett would invest in. Leave the complex algorithms and "Greeks" for the floor traders. Erik Kobayashi-Solomon, former investment banker, hedge fund risk manager, and valuation consultant to the World Bank, gives you the knowledge and sophistication to understand what options pricing reveals about the market's estimation of future stock prices. He then demonstrates how to find tremendous opportunity for low-risk, high-profit investments in the difference between the market's mechanized price ranges and ones made by you, a

thoughtful human being armed with the insight this book offers. Everything you need to make options a powerful contributor to your portfolio is inside, including: A thorough explanation of what options are and what their prices can tell you about the market's expectations for the future price of a stock A proven way to envision the risk/reward trade-off for stocks and options and a straightforward method to use the flexibility and directionality of options to tilt the risk/return balance in your favor A robust and intuitive framework for assessing the value of a company Strategies to avoid the most common behavioral pitfalls Tips for using the information on an option-pricing screen Thorough coverage of important option investment strategies, including "covered calls," "protective puts," and "collars" Regardless of your experience level with options, this versatile guide makes you a better investor. Beginners get a turnkey solution to growing wealth in options, experienced investors gain savvy guidance for fine-tuning their practices, and professional investors learn how to effectively incorporate options into a portfolio. Understanding valuation in this perceptive light lets you earn the consistent profits of The Intelligent Option Investor. The Intelligent Option Investor is the hands-on guide to using a cutting-edge valuation framework in the fast-paced options market to boost growth, protect gains, and generate income. It explains how to use your insightful human mind to recognize when mechanized options pricing undervalues a stock. Once you see an opportunity, you'll have all the tools you need to execute a fact-based decision about how and when to invest in the company. Have your money make the most for you with the potent blend of time-honored value investing strategies and hot options vehicles in The

Intelligent Option Investor. PRAISE FOR THE INTELLIGENT OPTION INVESTOR: "The Intelligent Option Investor reflects Erik's keen understanding of how companies create value for their owners, which is essential to successful option investing. In addition to showcasing Erik's expertise in developing option investment strategies based on fundamental security analysis and a long-term time horizon, this book delivers the information in a way that's accessible to individual investors, offering them the resources to use options to help them meet their financial goals."

-- JOE MANSUETO, founder, chairman, and CEO, Morningstar, Inc.

"Erik knows--and lays out here--that to use options successfully, you need to understand the underlying stock and its valuation first. This is one of few books on options that teaches this fruitful, combined approach. And that's why it works." -- JEFF FISCHER, advisor, Motley Fool Options

#### Popularity: A Bridge between Classical and Behavioral Finance

McGraw Hill Professional

Classical and behavioral finance are often seen as being at odds, but the idea of "popularity" has been introduced as a way of reconciling the two approaches. Investors like or dislike various characteristics of securities for rational reasons (as in classical finance) or irrational reasons (as in behavioral finance), which makes the assets popular or unpopular. In the capital markets, popular (unpopular) securities trade at prices that are higher (lower) than they would be otherwise; hence, the shares may provide lower (higher) expected returns. This book builds on this idea and expands it in two major ways. First, it introduces a rigorous asset pricing model, the popularity asset pricing model (PAPM), which adds investor preferences for security

characteristics other than the risk and expected return that are part of the capital asset pricing model. A major conclusion of the PAPM is that the expected return of any security is a linear function of not only its systematic risk (beta) but also of all security characteristics that investors care about. The other major contribution of the book is new empirical work that, while confirming the well-known premiums (such as size, value, and liquidity) in a popularity context, supports the popularity hypothesis on the basis of portfolios of stocks based on such characteristics as brand value, sustainable competitive advantage, and reputation. Popularity unifies the factors that affect price in classical finance with those that drive price in behavioral finance, thus creating a unifying theory or bridge between classical and behavioral finance.

#### The Current State of Quantitative Equity Investing McGraw Hill Professional

The investing strategy that famously generates higher returns with substantially reduced risk--presented by the investor who invented it "A treasure of well researched momentum-driven investing processes." Gregory L. Morris, Chief Technical Analyst and Chairman, Investment Committee of Stadion Money Management, LLC, and author of Investing with the Trend Dual Momentum Investing details the author's own momentum investing method that combines U.S. stock, world stock, and aggregate bond indices--a formula proven to dramatically increase profits while lowering risk. Antonacci reveals how momentum investors could have achieved long-run returns nearly twice as high as the stock market over the past 40 years, while avoiding or minimizing bear market losses--and he provides

the information and insight investors need to achieve such success going forward. His methodology is designed to pick up on major changes in relative strength and market trend. Gary Antonacci has over 30 years experience as an investment professional focusing on under exploited investment opportunities. In 1990, he founded Portfolio Management Consultants, which advises private and institutional investors on asset allocation, portfolio optimization, and advanced momentum strategies. He writes and runs the popular blog and website [optimalmomentum.com](http://optimalmomentum.com). Antonacci earned his MBA at Harvard. *Single Best Investment* McGraw Hill Professional

The latest, most complete data for more informed investment decisions *The 2017 Stocks, Bonds, Bills, and Inflation (SBBI) Yearbook* is the industry standard performance data reference, with comprehensive records dating back to 1926. Covering common stocks, long-term government bonds, long-term corporate bonds, Treasury bills, and the Consumer Price Index, this book provides the essential information advisors, planners, and brokers need to analyze asset class performance. Historical return figures include the riskless rate of interest, equity risk premium, bond default premium, and the maturity premium between the return on long-term governments and Treasury bills, and total returns and index values cover large and small company stocks, long- and intermediate-term government bonds, inflation, and more. Charts and graphs allow for quick visual reference, and a clear hierarchical organization pattern facilitates efficient data location. As the go-to reference for information and capital market returns, this book provides investors with the critical background they need to analyze future investments.

With the most complete historical data available, investors will be able to: Find annual index levels and total rates of return for five basic asset series Access historical return figures for four component series Estimate cost-of-capital based on comprehensive, reliable data Make informed judgments about future investment opportunities Performance analysis is critical to successful investing, but the analysis can only be as useful as the data is accurate. Decisions made from scant information are not good investment decisions; investors need complete, top-quality data to make informed choices and properly balance risk with reward. *The 2017 Stocks, Bonds, Bills, and Inflation (SBBI) Yearbook* is the definitive study of historical capital market data in the United States, and the gold-standard reference industry-wide.

*The Harriman Book Of Investing Rules* John Wiley & Sons Mainstay reference guide for wealth management, newly updated for today's investment landscape For over a decade, *The New Wealth Management: The Financial Advisor's Guide to Managing and Investing Client Assets* has provided financial planners with detailed, step-by-step guidance on developing an optimal asset allocation policy for their clients. And, it did so without resorting to simplistic model portfolios, such as lifecycle models or black box solutions. Today, while *The New Wealth Management* still provides a thorough background on investment theories, and includes many ready to use client presentations and questionnaires, the guide is newly updated to meet twenty-first century investment challenges. The book Includes expert updates from Chartered Financial Analyst (CFA) Institute, in addition to the core text of 1997's first edition endorsed by investment

luminaries Charles Schwab and John Bogle Presents an approach that places achieving client objectives ahead of investment vehicles Applicable for self-study or classroom use Now, as in 1997, *The New Wealth Management* effectively blends investment theory and real world applications. And in today's new investment landscaped, this update to the classic reference is more important than ever.

**Bonds** John Wiley & Sons

The era of buying and holding stocks is gone -- and will not return for some time. Now is the time to learn to target where the market is going to be, not where it has been, so you can invest successfully. Financial expert John Mauldin makes a powerful, almost irrefutable case regarding the future direction of the markets. He then details a new approach to investing that will allow you to adjust to the new reality of investing. You'll consider options beyond traditional stock portfolios as you learn to choose between the stable and secure investments that will enable you to profit in turbulent markets. Buy your copy of this must-read investment roadmap today.

Investments FT Press

"This exceptional book provides valuable insights into the evolution of financial economics from the perspective of a major player." -- Robert Litzenberger, Hopkinson Professor Emeritus of Investment Banking, Univ. of Pennsylvania; and retired partner, Goldman Sachs *A History of the Theory of Investments* is about ideas -- where they come from, how they evolve, and why they are instrumental in preparing the future for new ideas. Author Mark Rubinstein writes history by rewriting history. In unearthing long-forgotten books and journals, he corrects past oversights to

assign credit where credit is due and assembles a remarkable history that is unquestionable in its accuracy and unprecedented in its power. Exploring key turning points in the development of investment theory, through the critical prism of award-winning investment theory and asset pricing expert Mark Rubinstein, this groundbreaking resource follows the chronological development of investment theory over centuries, exploring the inner workings of great theoretical breakthroughs while pointing out contributions made by often unsung contributors to some of investment's most influential ideas and models.

**The Equity Risk Premium** AdvisorPress

For undergraduate and MBA investments courses. This book brings together the latest developments in investments, education, and computer software. It is written in a modular fashion for instructor flexibility in covering material in a sequence that accommodates their needs.\* International viewpoint - Chapters 6, Global Stock Markets, Chapter 17, Foreign Exchange, Chapter 18, Global Investing, and Chapter 19, Global Bond Markets. \* Importance of security price indexes - Covered in 3 chapters: Chapter 10, Creating Price Indexes; Chapter 11, Selected Market Indexes - Presents domestic and international indexes; Chapter 12, Using Indexes - Discusses index mutual funds, index options, and index future contracts. \* Interactive study Guide - Complete with Ibbotson Associates data ([www.prenhall.com/francis](http://www.prenhall.com/francis)). \* Coverage of Electronic Communications Networks (ECNs) and related developments. \* Familiarizes students with new developments such as order working systems, international electronic trading books, and more. \* Non-mathematical explanation of various risks associated

with bond investments. \* Provides students with non-intimidating discussion of duration, convexity, credit risk, soverei

### **Creating an Investment Policy Statement** Harpercollins

This comprehensive reference delivers a toolkit for harvesting market rewards from a wide range of investments. Written by a world-renowned industry expert, the reference discusses how to forecast returns under different parameters. Expected returns of major asset classes, investment strategies, and the effects of underlying risk factors such as growth, inflation, liquidity, and different risk perspectives, are also explained. Judging expected returns requires balancing historical returns with both theoretical considerations and current market conditions. Expected Returns provides extensive empirical evidence, surveys of risk-based and behavioral theories, and practical insights.

### Expected Returns John Wiley & Sons

For the first time, the tactics, strategies and insights relied on by 150 of the world's most respected financial experts are revealed in a concise, digestible form. Each provides focused and practical rules on how to succeed in the market. Often counter-intuitive, their rules tell you exactly what to do and what not to do. No padding; just a rock-hard list of do's and don'ts.

### *The Intelligent Asset Allocator: How to Build Your Portfolio to Maximize Returns and Minimize Risk* John Wiley & Sons

What is an Investment Policy Statement? The IPS provides the foundation for all future investment decisions to be made by an investor. It serves as a guidepost, identifying goals, creating a system and discipline for a decisions. A client said, "Once the trustees adopted the Investment Policy Statement, we found that we were making our decisions in a deliberate fashion, rather than

in the "heat of battle." "Since we'd already thought about how things would get done under a variety of circumstances, we no longer found ourselves getting emotional. Planning ahead makes it easier for all of us when the investment markets get turbulent." If you are an investment advisor, financial planner, stock broker, insurance agent, CPA or attorney advising your clients about their money, this innovative book will be a key tool for working with clients.

### *Asset Management* John Wiley & Sons

Portfolio Design - choosing the right mix of assets appropriate to a particular investor - is the key to successful investing. It can help you accumulate wealth over time, while cushioning the blow of possible economic downturns. But in order to successfully achieve this goal, you need to be familiar with all of the major asset classes that go into modern portfolios and learn how much they add to portfolio diversification. Thoughtful asset allocation provides discipline to the investment process and gives you the best chance of building and safeguarding wealth. Wharton Professor Richard C. Marston, 2014 recipient of the Investment Management Consultants Association's prestigious Matthew R. McArthur Award, will guide you through the major decisions that need to be made when designing a portfolio and will put you in the best position to balance the risk-reward relationship that is part of this endeavor. Portfolio Design is to be read by investment advisors. The book is rich in information about individual asset classes, including both traditional assets like stocks and bonds as well as alternative assets such as hedge funds, private equity, real estate, and commodities. So it should appeal to all sophisticated advisors whether or not they are trying to qualify

for one of the major investment designations. In fact, the book is designed to be read by any advisor who is as fascinated as Marston by the investment process.

The Art of Value Investing Global Investing Provides data and analysis on US and international investment opportunities. Covers more than 40 countries, listing return data on all major asset categories and relating these returns to factors such as risk, marketability, taxation, and information costs. Numerous graphs, charts, and tables permit a quick comparison of investment choices. Information is also included on capital market wealth, inflation rates, asset allocation, venture capital, currencies and exchange rates, derivative securities, and future trends.

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Numerous graphs, charts, and tables permit a quick comparison of investment choices. Information is also included on capital market wealth, inflation rates, asset allocation, venture capital, currencies and exchange rates, derivative securities, and future trends. Annotation copyright by Book News, Inc., Portland, OR

Investing DeMYSTiFieD, Second Edition Harriman House Limited A financial advisor shares her client's stories—and provides a five-step plan for building a comfortable future. Most people tend to focus on this month's credit card statement or next year's raise—but not much further. They simply wait too long to save and plan for the future—and then panic. Licensed Financial Advisor

Christine Ibbotson makes getting your financial life in order a doable project by offering accessible and realistic guidelines in a series of achievable steps—from debt elimination to wealth management. In addition, she relates stories from her clients' lives as they deal with subjects such as mortgages, second careers, budget trimming, family situations that affect finances, and much more. With these real-life examples, plus smart tools and techniques, you can create your own easy-to-follow money plan.

*Personal Finance and Investments* Wiley

In this book, the author draws from finance, psychology, economics, and other disciplines in business and the social sciences, recognizing that personal finance and investments are subjects of study in their own right rather than merely branches of another discipline. Considerable attention is given to topics which are either ignored or given very little attention in other texts. These include: the psychology of investment decision-making stock market bubbles and crashes property investment the use of derivatives in investment management regulation of investments business. More traditional subject areas are also thoroughly covered, including: investment analysis portfolio management capital market theory market efficiency international investing bond markets institutional investments option pricing macroeconomics the interpretation of company accounts. Packed with over one hundred exercises, examples and exhibits and a helpful glossary of key terms, this book helps readers grasp the relevant principles of money management. It avoids non-essential mathematics and provides a novel new approach to the study of personal finance and investments. This



book will be essential for students and researchers engaged with personal finance, investments, behavioural finance, financial derivatives and financial economics. This book also comes with a supporting website that includes two updated chapters, a new article featuring a behavioural model of the dot com, further exercises, a full glossary and a regularly updated blog from the author.

**Modern Investment Management** John Wiley & Sons  
Quantitative equity management techniques are helping investors achieve more risk efficient and appropriate investment outcomes. Factor investing, vetted by decades of prior and current research, is growing quickly, particularly in the form of smart-beta and ETF strategies. Dynamic factor-timing approaches, incorporating macroeconomic and investment conditions, are in the early stages but will likely thrive. A new generation of big data approaches are rendering quantitative equity analysis even more powerful and encompassing.

*Advances in Active Portfolio Management: New Developments in Quantitative Investing* McGraw-hill

Start building a rock-solid portfolio with as little as \$500! Do you think cash vehicle is another phrase for "expensive car"? Would you know a hybrid investment if you saw one? Does T-bill mean anything to you? The world of investing is a complex (and sometimes scary) place. Fortunately, you have a knowledgeable tour guide that speaks a language you understand! Investing DeMYSTiFieD, Second Edition, untangles an otherwise perplexing topic, making it easier than ever to invest like a veteran! Outlining step-by-step techniques for making the most of your money while keeping it out of harm's way, this self-teaching

guide explains how to identify and take advantage of rich opportunities--from mutual funds to taxfree bonds to real estate. Market-proven tips and techniques, handy checklists, and chapter-ending quizzes help you build a solid foundation on the subject at your own speed. This fast and easy guide helps you:  
Determine your investment personality to increase your success  
Protect your money from the next market downturn  
Boost returns while managing risk with the right allocation strategies  
Understand balance sheets, income statements, and other documents  
Generate greater returns from your 401(k), IRA, or other retirement account  
Simple enough for a novice but challenging enough for an experienced investor, Investing DeMYSTiFieD helps you put your money in the right places, whether you're looking to earn quick cash or build for the future.  
Nimbus+ORM

HOW DOES MONEY HELP IN CREATING A HAPPY LIFE? In *The Geometry of Wealth*, behavioral finance expert Brian Portnoy delivers an inspired answer based on the idea that wealth, truly defined, is funded contentment. It is the ability to underwrite a meaningful life. This stands in stark contrast to angling to become rich, which is usually an unsatisfying treadmill. At the heart of this groundbreaking perspective, Portnoy takes readers on a journey toward wealth, informed by disciplines ranging from ancient history to modern neuroscience. He contends that tackling the big questions about a joyful life and tending to financial decisions are complementary, not separate, tasks. These big questions include: • How is the human brain wired for two distinct experiences of happiness? And why can money "buy" one but not the other? • Why is being market savvy among the

least important aspects of creating wealth but self-awareness among the most? • Can we strike a balance between pushing for more and being content with enough? This journey memorably contours along three basic shapes: A circle, triangle, and square help us visualize how we adapt to evolving circumstances, set

clear priorities, and find empowerment in simplicity. In this accessible and entertaining book, Portnoy reveals that true wealth is achievable for many—including those who despair it is out of reach—but only in the context of a life in which purpose and practice are thoughtfully calibrated.

Best Sellers - Books :

- [The Psychology Of Money: Timeless Lessons On Wealth, Greed, And Happiness](#)
- [The Creative Act: A Way Of Being By Rick Rubin](#)
- [Bluey And Bingo's Fancy Restaurant Cookbook: Yummy Recipes, For Real Life By Penguin Young Readers Licenses](#)
- [How To Catch A Mermaid](#)
- [Kindergarten, Here I Come! By D.j. Steinberg](#)
- [Iron Flame \(the Emphyrean, 2\) By Rebecca Yarros](#)
- [Daisy Jones & The Six: A Novel By Taylor Jenkins Reid](#)
- [Never Never: A Romantic Suspense Novel Of Love And Fate By Colleen Hoover](#)
- [A Court Of Thorns And Roses \(a Court Of Thorns And Roses, 1\)](#)
- [If He Had Been With Me](#)