Investing in Closed-end Funds - Albert J. Fredman 1991 This book is the only up-to-date comprehensive book on the subject written for investors as well as stock brokers and financial planners.

Closed-end Fund Secrets - Sean Masaki Flynn 2004-03 Closed-end mutual funds are the hugely profitable secret that Wall Street doesn't want you to know about. They can be used to uniquely diversify any portfolio so that you can make money in either bull or bear markets and can totally eliminate the huge negative effects of management fees on your retirement portfolio. Closed-end Fund Secrets reveals these secrets and more to small investors so that they can finally reap the huge rewards of investing in closed-end funds. The secrets are also demystified and stripped of Wall Street "finance lingo" by the author, Sean Flynn, Ph.D., who performed a similar public service in his best seller Economics for Dummies.

Mutual Funds and Exchange-Traded Funds - Halil Kiymaz 2015-11-18 This publication offers a synthesis of the theoretical and empirical literature primarily on mutual funds but also discusses related investment vehicles, especially ETFs. Noted scholars and practitioners write chapters in their areas of expertise.

Research Handbook on the Regulation of Mutual Funds - William A. Birdthistle 2018-10-26 With fifty trillion in worldwide assets, the growth of mutual funds is a truly global phenomenon and deserves a broad international analysis. Local political economies and legal regimes create different regulatory preferences for the oversight of these funds, and academics, public officials, and legal practitioners wishing to understand the global investing environment will require a keen awareness of these international differences. The contributors, leading scholars in the field of investment law from around the world, provide a current legal analysis of funds from a variety of perspectives and using an array of methodologies that consider the large fundamental questions governing the role and regulation of investment funds. This volume also explores the identity and behavior of investors as well as issues surrounding less orthodox funds, such as money market funds, ETFs, and private funds. This Handbook will provide legal and financial scholars, academics, lawyers and regulators with a vital tool for working with mutual funds.

Mutual Funds For Dummies - Eric Tyson 2010-06-15 Position your portfolio for growth with one of America's bestselling mutual fund books Indicators are pointing to a rebound in mutual funds, and investors are returning! Newly revised and updated, Mutual Funds For Dummies, 6th Edition, provides you with expert insight on how to find the best-managed funds that match your financial goals. With straightforward advice and a plethora of specific up-to-date fund recommendations, personal finance expert Eric Tyson helps you avoid fund investing pitfalls and maximize your chances of success. This revised edition features expanded coverage of ETFs, fund alternatives, and research methods Tyson provides his time-tested investing advice, as well as updates to his fund recommendations and coverage of tax law changes Sample fund portfolios and updated forms show you exactly how to accomplish your financial goals Pick the best funds, assemble and maintain your portfolio, evaluate your funds' performance, and track and invest in funds online with Mutual Funds For Dummies, 6th Edition!

The Complete Guide to Investing in Bonds and Bond Funds - Martha Maeda 2009 Bonds have been a stalwart of investment, More than $100 billion was invested in municipal bonds alone in 2006. Now, with the economy a little less certain than it has been in recent decades, the demand for a secure place to invest money has lead to resurgence in interest in the use of bonds for many investors. Because there are many peculiarities in bond investment, you must have a basic understanding of the market, the bond issuer, how to measure rates of return and how to maximize those rates. This book provides anyone who has never invested in bonds before the ideal handbook to start investing in and earning massive returns from bonds. You will learn everything the savvy investor needs to effectively turn a high risk portfolio into a constantly growing, steadily developing source of wealth. You will learn how bonds operate on a very basic level, including the numerous different kinds of bonds and how bond funds can be a highly lucrative option. You will learn the fundamental differences between government, municipal, and corporate bonds and how much of a return you can expect from each. You will learn the basic methods of valuation and yield that bonds are measured by and how you can evaluate bonds with three basic steps. You will be guided through determining the face value, coupon rate, and sale price of a bond, as well as the ratings, insurance, maturity, callability, and taxes that might be associated with it. The importance of interest rates, inflation, and supply and demand in affecting the yield of your bonds will be detailed as well to ensure you make a careful investment. In addition to a comprehensive guide on the many options and methods of investing in bonds, dozens of interviews with financial gurus from around the nation have been conducted to provide critical, real world advice on how to successfully invest your money into bonds. You will be shown the risk free methods by which to invest in bonds, making low interest returns on U.S. government bonds, as well as the higher risk methods that will allow you to make great returns by investing in industrial and corporate bonds. You will learn how to look overseas for even more lucrative options and how to measure the risk of your bonds based on the debt in which you are investing and the callability of any one bond issuer. You will be shown how to effectively balance your portfolio to include bonds without ignoring the necessity and place for other investments. For any investor who has been agonizing over how to safely invest money for a high return, this book is for you, guiding you through the complex, but rewarding, world of bond investments. Atlantic Publishing is a small, independent publishing company based in Ocala, Florida. Founded over twenty years ago in the company president Steve's garage, Atlantic


The Mutual Funds Book—Alan Northcott 2009 Over the past decade, American investors increasingly have turned to mutual funds to save for retirement and meet other financial goals. Mutual funds can offer the advantages of diversification and professional management. It pays to understand both sides of the underlining economics and know how to choose funds that match your goals and tolerance for risk. As with other investment choices, investing in mutual funds involves risk, fees, and taxes. This new book explains the basics of mutual fund investing how mutual funds work, what factors to consider before investing, and how to avoid common pitfalls. Mutual funds are not guaranteed or insured by the FDIC or any other government agency. Even if you buy through a bank, and the fund carries the bank’s name. You can lose money investing in mutual funds. In addition, there are more than 10,000 mutual funds to choose from. The combined assets of the nation’s mutual funds increased by $132.8 billion, or 1.3 percent, to $10.414 trillion in December 2006, according to the Investment Company Institute’s (ICI) official survey of the mutual fund industry. In the book, mutual fund companies, the timing of decisions. Combining clear summaries of existing research with practical guidelines for mutual fund results, buy/sell decisions, and the timing of decisions. Combines clear summaries of existing research with practical guidelines for mutual fund investment, this book employs a balanced approach to fund selection, this book employs a balanced approach to academics, and general investors alike. Avoiding the less useful descriptive language of mutual fund investing and what the lingo means to you: net asset value, load versus no load, turnover, expenses and total expense ratios, capitalization, share classes, growth versus value, dollar cost averaging and many more. We have also included a history of mutual funds (including their scandals), and we have disclosed the mysteries of documents you will encounter in mutual fund investing, such as their ratings, share classes, fees, annual reports, and prospectuses. How to compare your fund to the competition, how to compare it to other types of investments, and how to compare various funds on an after-tax basis. We also include the upside and the downside of mutual fund investing. Funds often trade at discounts to net asset value, providing savvy investors an opportunity to buy baskets of securities at discounted prices. They are also mean reverting, presenting potent investment opportunities for the educated investor. The reader will learn to: track fund premium/discounts; relative strength, and price patterns through clear, easy step-by-step instructions. The author covers computer macros for popular spreadsheet programs that assist in the construction of effective portfolios for growth, international, or income investing.

Power Investing with Closed-End Funds—Peter W. Madlem 2000-12 Power Investing with Closed-End Funds offers a proven investment strategy based on the author’s 15 years of closed-end fund investing. Closed-end funds often trade at discounts to net asset value, providing savvy investors an opportunity to buy baskets of securities at discounted prices. They are also mean reverting, presenting potent investment opportunities for the educated investor. The reader will learn to: track fund premium/discounts; relative strength, and price patterns through clear, easy step-by-step instructions. The author covers computer macros for popular spreadsheet programs that assist in the construction of effective portfolios for growth, international, or income investing.

Investing Made Simple—Anthony Loviscek 2010-05-12 Watch Your Money Grow! In today’s complicated financial jungle, the possibilities for turning capital into fortunes are endless. Investing Made Simple is the perfect guide for helping the would-be investor gain the knowledge and confidence essential for long term wealth building. Topics include: Stocks Bonds Real estate Futures Derivatives IPOs and second offerings Insurance international perspectives Shopping for bargains Diversification Stock charts All terms are thoroughly explained, and the pros and cons of each route, as well as how to get started, are outlined. From helping you understand your investment goals to managing your portfolio, Investing Made Simple is the complete understanding and finding investment opportunities that work for you. Look for other Made Simple Books Accounting Made Simple Arithmetic Made Simple Biology Made Simple Bookkeeping Made Simple Business Letters Made Simple Chemistry Made Simple English Made Simple French Made Simple German Made Simple Ingles Hecho Facil Printing Made Simple Italian Made Simple Learning English Made Simple Mathematics Made Simple The Perfect Business Plan Made Simple Philosophy Made Simple Physics Made Simple Psychology Made Simple Sign Language Made Simple Spanish Made Simple Spelling Made Simple Statistics Made Simple Touch Typing Made Simple Your Small Business Made Simple www.broadwaybooks.com

Guide to Understanding Islamic Investing in Accordance with Islamic Shariah—Virginia B. Morris 2001

Mutual Funds—John Haslem 2009-02-09 This authoritative book enables readers to evaluate the various performance and risk attributes of mutual funds, while also serving as a comprehensive resource for students, academics, and general investors alike. Avoiding the less useful descriptive approach to fund selection, this book employs a balanced approach including both technique and application. The chapters combine clear summaries of existing research with practical guidelines for mutual fund analysis. Enables readers to analyze mutual funds by evaluating a fund’s various performance and risk attributes. Includes templates, which provide an efficient, sound approach to fund analysis, interpretation of results, buy/sell decisions, and the timing of decisions. Combines clear summaries of existing research with practical guidelines for mutual fund analysis.
Investing for Life—Chandler Deyo 2007-10-01 This book is about taking financial responsibility for yourself. It’s about learning, investing and dreaming about future goals and aspirations. It will help a young person get started in investing or give some new ideas to seasoned investors. Becoming knowledgeable in investing will allow you to become more confident and successful in life. I also provide some of my financial stories that you may find interesting.

36 Stratagems for Investors—HSBC Jintrust Fund Management 2012-11-26 The 36 Stratagems are a unique collection of ancient Chinese proverbs that describe some of the most cunning and sublet strategies ever devised by man. Readers, and specifical investors, at all levels will benefit from this interpretation of the 36 stratagems detailing how to apply them in investment and “economic warfare.” HSBC’s 36 stratagems encourage flexibility and new ways of thinking about investment issues. “Investor education is not merely about how many lessons can be betaught, but how much investors can learn from each lesson. This book combines modern investment and ancient Chinese wisdom in plain-language and with interesting stories. It explores investment concepts yet opens your mind and shows you a new way of understanding fund investing.” Mark McCombe, Global Chief Executive Officer, HSBC Global Asset Management

Mutual Funds—John A. Haslem 2009-10-08 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 and bond investments, and making mutual 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 Coveting major theoretical and management issues in mutual fund analysis and portfolio management, this book is an authoritative guide.

Yes, You Can Be a Successful Income Investor!—Ben Stein 2010-07-09 With the bursting of the stock market bubble, and after 13 rate cuts by the Federal Reserve, yields on CDs and money market funds trend at historic lows—a negative return after inflation. Gone are the days when investors could earn 5 percent interest, risk-free. With smaller savings coupled with lower returns on what savings remain, retirees and others living on fixed-income investments watch in horror as their income checks shrink with each passing month. However, there are investments that still earn a significant rate of return—and do so reliably and consistently. These fixed-income securities include bonds, real estate investment trusts, preferred stock, emerging market debt, and annuities, among others. They earn the kind of returns that baby boomers and the retirement community need in the same way they need to draw breath, yet hardly anyone knows anything about them. As 70 million Americans reach retirement age in the next 15 years, fixed-income investing will become a sociologically inevitable mega trend. Yes, You Can Be a Successful Income Investor! shows you how you can safely secure the highest possible yield from your savings, even in a treacherous investment environment.

Income Investing Today—Richard Lehmann 2007-04-18 Income Investing Today details a safe alternative to the downside risks inherent in the stock market—income securities that can provide a 7% to 8% annual cash income. With this book, fixed-income expert Richard Lehmann outlines income investing concepts you need to understand, various investment vehicles, and investment strategies that will help you build a safe, diversified portfolio of investments. The investment vehicles he explains range well beyond traditional fixed income securities or creditor instruments such as bonds, to include hybrids, REITs, mutual funds, and more. He shows that the key to building a steady, growth-oriented investment portfolio is to diversify over a variety of securities that depend on different drivers—that is, portfolios that are not vulnerable to any one specific economic factor such as interest rates. The ideal guide for individual investors saving for retirement and seeking more safety in their portfolios, Income Investing Today shows how a diversified collection of income securities can equal or exceed the returns from common stock with much lower risk.

Bonds—Mark Mobius 2012-06-26 Demystifying the world of bonds, this guide, as part of The Mark Mobius Master Class, offers a comprehensive learning experience that features clear definitions of financial terms, real-life anecdotes and much more.

Investing in the High Yield Municipal Market—Triet Nguyen 2012-06-08 A practical guide to profiting from the high yield municipal market This unique guide to the high yield municipal bond market sheds some much-needed light on this esoteric but profitable corner of the fixed income world. It fills the void between the general reference handbooks on municipal bonds and the superficial treatment of do-it-yourself bond guides, with an emphasis on practical trading applications. Having witnessed the beginning of the modern high yield tax-exempt institutional market, author Triet Nguyen documents its historical evolution, outlines a conceptual framework for high yield tax-free investing, one that takes into account both interest rate and credit cycles, and reviews the latest historical data on municipal defaults, including for the first time the non-rated sector. Current distressed opportunities are also discussed. Along the way, Nguyen takes the time to discuss in detail the pros and cons of investing in pre-packaged high yield vehicles—from mutual funds to hedge funds to exchange-traded funds—with frank and objective insider tips on how these slickly marketed products really work. For the truly committed investor who wants to do his or her own homework, Nguyen and a group of industry experts go over the key investment considerations for several major classes of high yield tax-exempt bonds. Offers unique insights into the risk/return, trading, and liquidity characteristics of high yield municipal instruments Includes interesting case studies that illustrate the high yield investing process Written by an insider of both the asset management industry and the broker-dealer community Investing in the High Yield Municipal Market will put you in a better position to profit in this arena and help you excel in today’s tough financial environment.

108 Questions & Answers on Mutual Funds & SIP—Yadnya Investments 2017-08-18 Have you ever thought of letting your money work for you by being a part of the Indian growth story but the complicated financial jargon, perplexing terms and conditions, dilemma associated with risky investments and too many mutual fund options stopped you? This book provides answers to all such FAQs that an Indian Mutual Fund and SIP investor has. This book will help you understand the various types of mutual funds, their comparison with other assets, ways to invest in mutual funds and identify the type of funds that fit your profile the best. The focus of the book is on simplifying myriad concepts of mutual funds and demystifying myths around these investment risks. The author has approached this book in a question-answer format with lots of recent examples.

The Little Book of Emerging Markets—Mark Mobius 2012-04-24 A guide to emerging-market investing discusses reasons to invest, different ways to do it, the risks involved, picking viable areas to invest in, and when and how to get out.
The Five Rules for Successful Stock Investing
Pat Dorsey
2011-01-04
The Five Rules for Successful Stock Investing *By resisting both the popular tendency to use gimmicks that oversimplify securities analysis and the academic tendency to use jargon that obfuscates common sense, Pat Dorsey has written a substantial and useful book. His methodology is sound, his examples clear, and his approach timeless.* --Christopher C. Davis Portfolio Manager and Chairman, Davis Advisors
Over the years, people from around the world have turned to Morningstar for strong, independent, and reliable advice. The Five Rules for Successful Stock Investing provides the kind of savvy financial guidance only a company like Morningstar could offer. Based on the philosophy that "investing should be fun, but not a game," this comprehensive guide will put even the most cautious investors back on the right track by helping them pick the right stocks, find great companies, and understand the driving forces behind different industries--without paying too much for their investments. Written by Morningstar's Director of Stock Analysis, Pat Dorsey, The Five Rules for Successful Stock Investing includes unparalleled stock research and investment strategies covering a wide range of stock-related topics. Investors will profit from such tips as: * How to dig into a financial statement and find hidden gold . . . and deception * How to find great companies that will create shareholder wealth * How to analyze every corner of the market, from banks to health care and technology--and highly accessible. The Five Rules for Successful Stock Investing should be required reading for anyone looking for the right investment opportunities in today's ever-changing market.

Morningstar Guide to Mutual Funds
Christine Benz
2007-10-26
Presents anecdotes and financial information that can be used to build and maintain a profitable mutual fund portfolio, explaining what mutual funds are, how they should be used, and what their advantages and disadvantages are.

The ETF Book
Richard A. Ferri
2011-07-26
ETFs are revolutionizing the investment industry. From their introduction in 1993, ETFs have expanded exponentially over the past fifteen years. You, as an informed investor, need to know what makes ETFs unique, how they work, and which funds may help you achieve your financial goals. The updated edition provides the most current look at the ETF market, where the number of funds has doubled since the book first published in December 2007. A huge number of bonds, commodities, currencies, leveraged and short funds have been introduced. Inactive or managed ETFs are here now, and some major mutual fund companies, like Fidelity and PIMCO, are getting into the market. Remarkably, the terminology in the ETF marketplace is also evolving at a rapid pace. The acronym ETF for exchange-traded product has become an industry standard. The term did not exist two years ago. Written by veteran financial professional and renowned author Richard A. Ferri, The ETF Book, Updated Edition gives you a broad, in-depth understanding of this important investment vehicle and provides you with the tools needed to successfully integrate exchange-traded funds into any portfolio. This detailed, yet clearly articulated guide contains the most-up-to-date information on navigating the rapidly growing number of ETFs available today. Divided into four comprehensive parts, this guide addresses everything from ETF basics and in-depth fund analysis to the tax benefits of using ETFs. Included are a variety of portfolio management strategies using ETFs and examples of different model portfolios that you can easily adapt to your own investment goals. Whether you're just getting started or are a seasoned ETF investor, the ETF Book, Updated Edition will help enhance your understanding of this evolving field. Examining the fundamental differences between exchange-traded portfolios, the ETF Book, Updated Edition highlights how to effectively implement a wide selection of ETFs from specifying specific ETF strategies and from buy and hold to market timing and sector rotation. The book describes the fund investing money. AND much more.

An Introduction to Mutual Funds Worldwide
Ray Russell
2007-04-04
This guide explains what mutual funds are, how they have developed and how they are used, regulated, and administered across the globe. Both open-ended and closed-ended funds are described and the differences between the international markets, particularly USA, Europe, and UK are addressed. Written by successful trainer and consultant, Ray Russell, the material reflects the growth and importance of the global mutual fund industry. Written in an accessible and straightforward manner, the guide provides a basic appreciation of Mutual Funds in their many forms, advocating the use of the mutual fund as a sensible, efficient, and ultimately rewarding means of investment. It covers the origins, purpose, development, uses, operation and regulation of mutual funds and draws attention to similarities and differences between major jurisdictions, commenting on their unique features and approaches.

Closed-End Funds, Exchange-Traded Funds, and Hedge Funds
Seth Anderson
2009-09-18
This book is both useful as a reference book and as an additive, educational overview of ETFs and hedge funds, as well as CEFs. In today's tumultuous markets, much reference is made to these subjects without a clear understanding of the vehicles, their structure and their history. This is a very timely publication and should be viewed as an important read. The book contains definitive explanations and includes an excellent summary of past works in this area. Readable, informative, and highly useful as a reference source. Seth Anderson, President and CEO, Bowling Portfolio Management

Investing in Preferred Stock
Paul Josephs
2010-01-29
Preferred stocks, also known as preferreds, have attracted a lot of attention in recent years, but few investors understand the features, risks, and returns of these intriguing investments. In this revised and updated second edition, Paul Josephs provides an unbiased and easy-to-understand introduction to preferred stocks, including: * The features of typical preferred stocks, including their pros and cons relative to common stocks and bonds * How to research and buy preferreds, including individual stocks, ETFs, and closed-end funds * Major risks of preferred stocks * How preferred stocks behave in good, stable, and tough economic times * Investment strategies and practical tips for investors who choose to invest in preferreds

Opportunity Investing
Gerald Appel
2006-11-26
This book provides valuable insight into a number of issues. It is filled with in-depth insights on different types of ETFs and practical advice on how to select and manage them. The appendixes are informative and highly useful as a reference source.