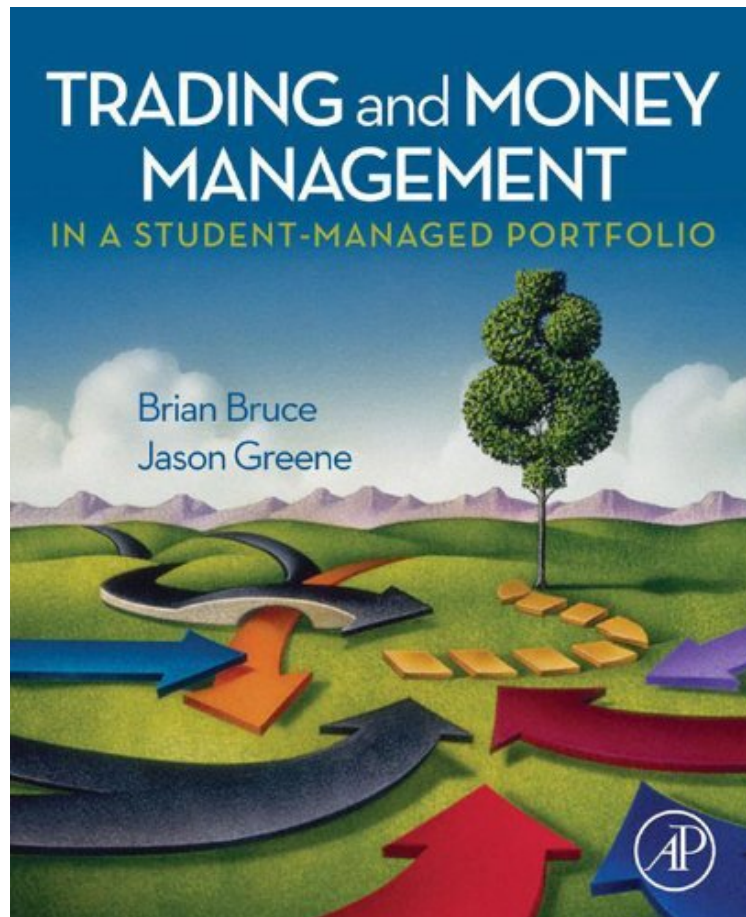


(Free pdf) Trading and Money Management in a Student-Managed Portfolio

## Trading and Money Management in a Student-Managed Portfolio

*Brian Bruce, Jason Greene*

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**Brian Bruce, Jason Greene : Trading and Money Management in a Student-Managed Portfolio** before purchasing it in order to gauge whether or not it would be worth my time, and all praised Trading and Money Management in a Student-Managed Portfolio:

2 of 2 people found the following review helpful. An Essential Resource for a Student-Managed Portfolio By Stephen Putbren Bruce and Greene have written an extremely useful text for a market that is currently under-served. While numerous traditional finance textbooks have been published covering theory and concepts from the literature, few have directly targeted the practical application of those concepts. Trading and Money Management does just that, bridging the gap between the material common to traditional undergraduate and graduate textbooks and practice-oriented portfolio management. Throughout the book, the central tenets of a well-thought out philosophy and process become obvious, and the authors do an excellent job of tying the material throughout the book back to these principles. While the book is meant to provide practical application within a student-investment fund, it does not skimp on important mathematical and theoretical concepts. The authors assume a cursory understanding of basic investment and portfolio theory concepts, but present sufficient discussion of the material before proceeding to application. This

approach makes the book thorough without becoming overly technical. In addition, the end-of-the chapter exercises are directly applicable to problems that those in portfolio management encounter. Any student interested in portfolio theory and investment management would further their skill set and sharpen their intellect by attempting the exercises. As a former member of an undergraduate student investment fund and a founding member of a graduate student investment fund, I can attest to the quality and usefulness of this book. Bruce and Greene have both led successful student funds managing greater than \$1 million, and their experience is noteworthy. The book could certainly be used in a wide variety of roles, ranging from a reference book for a student-managed fund to a required text for a course in portfolio management. Any business school interested in starting a student-managed fund would benefit from first consulting this book. With these utilities in mind, I would highly recommend *Trading and Money Management*.<sup>2</sup> of 2 people found the following review helpful. THE book for student-managed portfolio classes By Dr. William Reichenstein "Trading and Money Management in a Student-Managed Portfolio" is a must-have resource for anyone teaching a student-managed portfolio class. Bruce and Greene have decades of experience in professional money management and more than a decade of experience teaching student-managed portfolio classes. In contrast, traditional Ph.D. programs do not prepare someone to teach such a course. A traditional Ph.D.-trained professor like me was not prepared to teach such a class. On the other hand, a veteran of professional money management would benefit from Bruce and Greene's experiences in the classroom. The book begins by emphasizing the importance of crafting an investment philosophy and adhering to a consistent investment process. It discusses the organizational structure of a student-managed portfolio class. In addition to the usual material on security analysis, this text explains where students can find data sources for use in their analysis. It presents guidelines for student presentations, information which will prove useful to students and teachers alike. The text discusses performance evaluation metrics, attribution analysis, and how to report the portfolio's performance. Finally, it discusses competitions and forums available to student-managed portfolio classes and discusses the future of such classes. This text does an excellent job of helping a teacher set a professional setting for a student-managed portfolio class, while providing students with the skills for their analyses.<sup>0</sup> of 1 people found the following review helpful. Great Resource for Student Managed Portfolio Students and Teachers By Brian Bruce and Jason Greene have written an exceptional book for those involved in student managed portfolios. Though targeted at students, this book is also an excellent resource for professors like me who are teaching the course, or even schools that don't yet have a fund but would like to start one. The material is well laid out and takes the reader through topics such as philosophy and process, security selection, presentation of ideas, portfolio construction, and more. Within each chapter the authors dive into critical investment concepts and how to apply them. Both authors bring real world investment experience and experience advising student managed portfolios - as a result they do an excellent job conveying the framework of the investment process in a coherent and understandable manner for students learning about managing money on behalf of a client.

*Trading and Money Management in a Student-Managed Portfolio* is a hands-on textbook for student-managed investment funds (SMIFs). The book presents the applied material that textbooks on portfolios and investments always overlook. Its focus on "how-to" questions summarizes the disciplines and skills necessary for trading. Covering equities, hedge funds and derivatives, and fixed income, it captures the breadth and detail necessary for developing and executing trading strategies. Developed specifically for SMIF courses, the book features calculations, examples, and software that help you move from talking about markets to taking positions in them. Methodically summarizes the disciplines and skills necessary for trading Teaches you to build a ranking model for securities and write a research report for a sell-side firm Covers equities, fixed income, derivatives, and hedge funds

"This textbook for advanced undergraduate and graduate students who participate in a student-managed portfolio is designed to fill the gap between traditional academic textbooks on investments and portfolio management, and practice-oriented books on specific investment strategies." --ProtoView.com, March 2014 "The Bruce and Greene text provides a comprehensive toolkit for the practical management of a student managed investment fund, including many detailed examples taken from real world funds. It thoroughly covers all of the major topics in leading investments texts, but supplements theory with realistic practical application." --Gary C. Sanger, Louisiana State University From the Back Cover This hands-on textbook for student managed investment funds (SMIFs) presents the applied material that textbooks on portfolios and investments always overlook. Its focus on "how-to" questions summarizes the disciplines and skills necessary for trading. Covering equities, hedge funds and derivatives, and fixed income, it captures the breadth and the detail necessary for developing and executing trading strategies. Developed specifically for SMIF courses, the book features calculations, examples, and software that help students move from talking about markets to taking positions in them. About the Author Jason Greene is Professor of Finance at Southern Illinois University and faculty advisor for the Saluki Student Investment Fund (SSIU), which provides SIU students with hands-on experience in portfolio management and investment research.