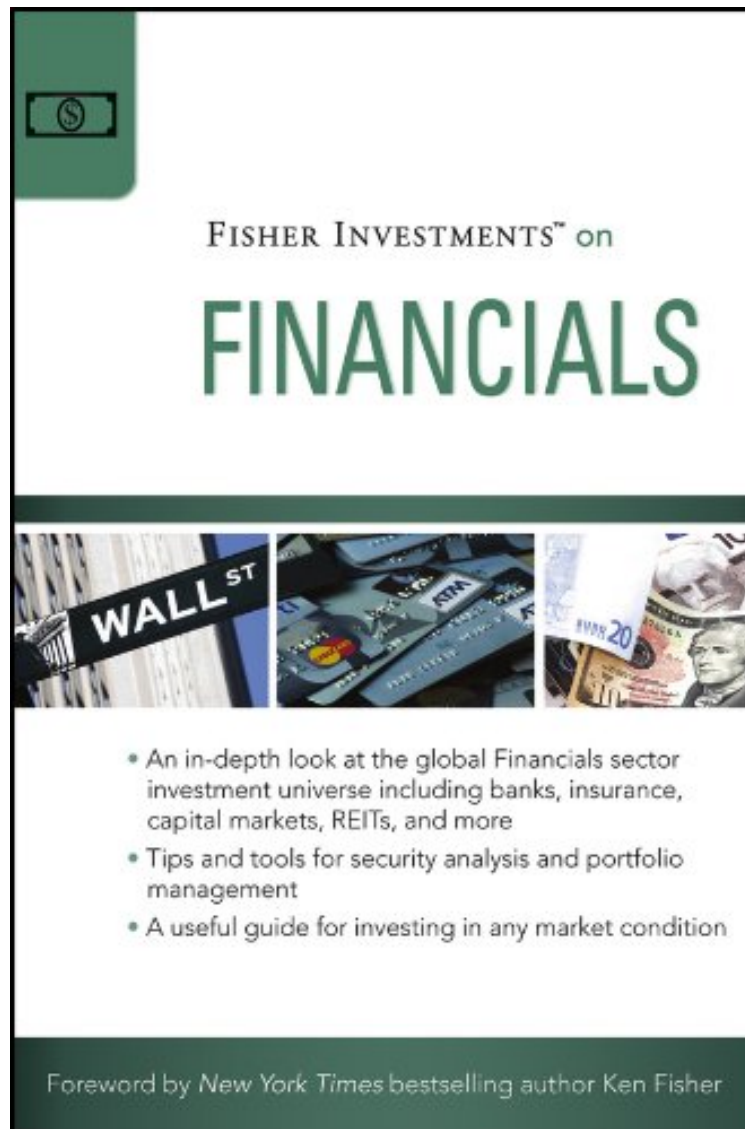


Fisher Investments on Financials (Fisher Investments Press)

Jarred Kriz

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Jarred Kriz : Fisher Investments on Financials (Fisher Investments Press) before purchasing it in order to gage whether or not it would be worth my time, and all praised Fisher Investments on Financials (Fisher Investments Press):

2 of 2 people found the following review helpful. Interesting informationBy Javier GonzalezIt is information for the beginner. It could be less dumbed down, presenting more meaningful insights. But it has a niche and it is really good for the beginner, or for a quick reference.2 of 2 people found the following review helpful. A first glimpseBy investingbythebooksWith this book the author provides the basis of an understanding of how to invest in the finance sector. The author is an analyst at Fisher Investments covering the financial sector and macro strategy and with this book Ken Fishers investment firm completed the book series going through how to invest in all 10 GICS

sectors. The structure of the book is the same as previously. A sector is presented and then a strategy for investing and portfolio construction is suggested. This later section is more or less similar for all the books. The intended audiences are individual investors, students and aspiring investment professionals and the goal is to provide them with the tools to make their own investment decisions. Contrary to what many perhaps believe Financials is a very diverse sector comprising of the industry groups 1) banks, 2) insurance, 3) real estate and so-called 4) diversified financials; and within these four there are plenty of further variations and business models. After an introductory chapter each of these industry groups get one chapter each ranging from 10 to 30 pages with a fair amount of white space. It stands to reason that discussing insurance with a text that might fill 5 or so A4-pages becomes very schematic. This doesn't make it wrong or bad; just not very comprehensive. I don't feel that any area has been unduly left out. The bulk of the description is focused on banks and with the relatively large size compared to the other industry groups this might be warranted. This is in comparison with for example the parallel book on Information Technology where the dominating industry group Software Services received very little attention. Despite the brevity the author presents many of the relevant concepts in the industry groups and does a fair job of discussing the foundation of their business models. What I would have wished for is 10 or 15 more pages adding some numerical examples. Financials is very much about the numbers in for example balancing various risks or balancing risk versus returns and the reader's understanding of financial indicators becomes somewhat limited if he only gets a verbal description of them. It's easy to criticize the books in this series for being overly rhapsodic, for using the same investment strategy section over and over again. I also think their writing generally lacks curiosity and passion; although Mr. Kirz's text was above average in this area. However, it's not easy to write about complicated areas in short form and if a private investor takes the time to read all ten texts (leaving the reading of the investment strategy to the last book) he will gain a good basic understanding of how most listed companies make money and what drives their shares and the ebb and flow of earnings. If these books didn't exist it would only be those who had access to the industry primers of investment banks that could get a similar overview of the investment universe. Considering that most private investors to a large extent lack a method for portfolio construction and risk management the method suggested by Fisher Investments might increase returns over long term. Not because I think it will make them outperform the market but because I think it will make them underperform less and also reduce their risks. This is probably an equally important contribution as giving private investors knowledge on sectors. This book is a good alternative for those who want to get a first glimpse of the financial sector but do not expect any deeper insights. This is a review by investingbythebooks.com 5 of 7 people found the following review helpful. Worst book every read-way off topic By Saurabh I read at least 2 books a month and I think this as the worst book I have every read. The book has no substance and effectively can be summarized in less than 10 pages. Extremely disappointed that something like this come from Fisher Investments. For anyone wanting to learn anything about analyzing financial institutions, this book should be an easy pass.

The easy-to-use resource for anyone looking to learn more about the financial sector and how to make the most of it The Fisher Investments On series is designed to provide individual investors, students, and aspiring investment professionals with the tools necessary to understand and analyze investment opportunities; primarily for investing in global stocks. Each guide is an easily accessible primer to economic sectors, regions, or other components of the global stock market. While this guide is specifically on Financials, the basic investment methodology is applicable for analyzing any global sector, regardless of the current macroeconomic environment. Following a top-down approach to investing, Fisher Investments on Financials can help you make more informed decisions within the Financials sector. It skillfully addresses how to determine optimal times to invest in Financials stocks and which Financials industries have the potential to perform well in various environments. The book is divided into three comprehensive parts; Getting Started, Financials Details, and Thinking Like a Portfolio Manager. Explains some of the sector's key macro drivers; like regulation, interest rates, and credit trends Shows how to capitalize on a wide array of macro conditions and industry-specific features to help you form an opinion on each of the industries within the sector Takes you through the major components of the industries within the global Financials sector and reveals how they operate Offers investment strategies to help you determine when and how to overweight specific industries within the sector Outlines a five-step process to help differentiate firms in this field; designed to help you identify those with the greatest probability of outperforming Filled with in-depth insights, Fisher Investments on Financials provides a framework for understanding this sector and its industries to help you make better investment decisions; now and in the future. With this book as your guide, you can gain a global perspective of the Financials sector and discover strategies to help achieve your investing goals.

From the Inside Flap The Fisher Investments On series is designed to provide individual investors, students, and aspiring investment professionals with the tools necessary to understand and analyze investment opportunities; primarily for investing in global stocks. Each guide is an easily accessible primer to economic sectors, regions, or other components of the global stock market. While this guide is specifically on Financials, the

basic investment methodology is applicable for analyzing any global sector, regardless of the current macroeconomic environment. Following a top-down approach to investing, Fisher Investments on Financials can help you make more informed decisions within the Financials sector. It skillfully addresses how to determine optimal times to invest in stocks and which industries have the potential to perform well in various environments. Divided into three comprehensive parts—Getting Started, Financials Details, and Thinking Like a Portfolio Manager—Fisher Investments on Financials: Explains some of the sector's key macro drivers—like regulation, interest rates, and credit trends Shows how to capitalize on a wide array of macro conditions and industry-specific features to help you form an opinion on each of the industries within the sector Takes you through the major components of the industries within the global Financials sector and reveals how they operate Offers investment strategies to help you determine when and how to overweight specific industries within the sector Outlines a five-step process to help differentiate firms in this field—designed to help you identify those with the greatest probability of outperforming Filled with in-depth insights, Fisher Investments on Financials provides a framework for understanding this sector and its industries to help you make better investment decisions—now and in the future. With this book as your guide, you can gain a global perspective on the Financials sector and discover strategies to help achieve your investing goals.

From the Back Cover This installment of the Fisher Investments On series is a comprehensive guide to the Financials sector, the largest sector in most broad equity indexes around the world and the lifeblood of the global economy. This reliable guide can help you in making top-down investment decisions specifically for the Financials sector. It shows how to determine better times to invest in Financials, which Financials industries and sub-industries are likelier to do best, and how individual stocks can benefit in various environments. The global Financials industry is large and complex, with the major part of the sector located outside the United States. Using the framework detailed in this book, you can learn to be better equipped to identify opportunities and avoid major pitfalls. Given the vast market landscape and diverse geographic operations, it is vital to maintain a global perspective when investing in the Financials sector. This invaluable resource provides the tools to help you understand and analyze opportunities both in the United States and abroad within this sector.

About the Author JARRED J. KRIZ has been in the financial services industry since 1997, with experience in the banking, investment banking, brokerage, and asset management fields. He regularly presents to audiences at investing workshops across the country and currently works as a Senior Capital Markets Research Analyst at Fisher Investments with a focus on the Financials sector and macroeconomic strategy.

About Fisher Investments Press Fisher Investments Press brings the research, analysis, and market intelligence of Fisher Investments' research team, headed by CEO and New York Times bestselling author Ken Fisher, to all investors. The Press covers a range of investing and market-related topics for a wide audience—from novices to enthusiasts to professionals.