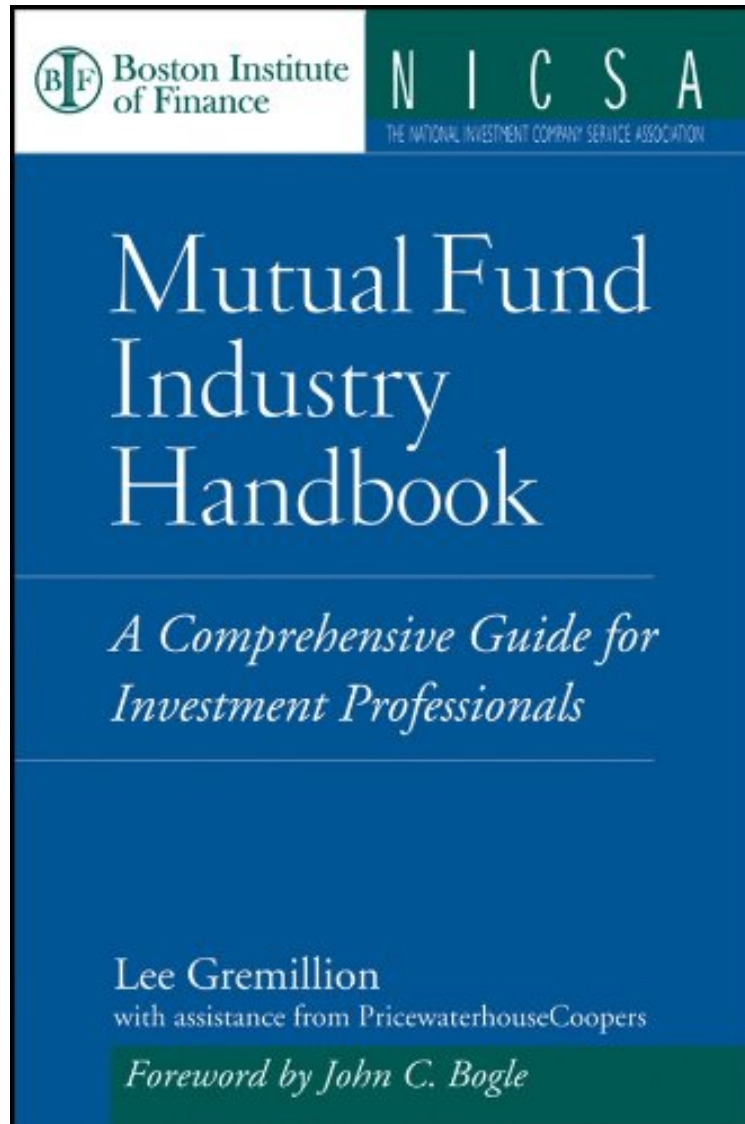


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Mutual Fund Industry Handbook: A Comprehensive Guide for Investment Professionals (Boston Institute of Finance)

Lee Gremillion

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Gaurav Sethi Very comprehensive book that gives a very different perspective on the Mutual Fund industry. While most books focus on the investor's perspective by explaining the different kinds of funds and their associated risk / return profiles, helping investors choose the best fund for their needs, this book is for professionals who work in the industry and want to understand how an investment management firm functions - its various groups and divisions and how all of them come together to serve the business. I read this book when after spending years in the financial services industry I got my first job at an asset management firm and it helped me understand the business impact of the technology team that I was a part of. 4 of 4 people found the following review helpful. Excellent and Unique Book By Jonathan Dudzinski Very few books have been written on the logistics and back office support necessary to run a mutual fund. This book does an exceptional job of covering the topic. 0 of 0 people found the following review helpful. Good comprehensive information on mutual funds By mike A good comprehensive outline of how mutual funds work, with references to sources for further information. Ideally, every mutual fund investor should read this. Includes interesting side stories on different aspects of mutual funds. Fairly clearly written.

"The Mutual Fund Industry Handbook is a remarkably important work . . . I am profoundly impressed by the broad and comprehensive sweep of information and knowledge that this book makes available to industry participants, college and business school students, and anyone else with a serious interest in this industry." -- From the Foreword by John C. Bogle President, Bogle Financial Markets Research Center Founder and former chief executive, The Vanguard Group A Foreword by John C. Bogle, founder of The Vanguard Group and one of the most respected leaders in the mutual fund industry, sets the stage for this authoritative book that explains the complexities of the phenomenal industry in simple terms. Investors like the fact that mutual funds offer professional management, easy diversification, liquidity, convenience, a wide range of investment choices, and regulatory protection. Mutual Fund Industry Handbook touches on all of those features and focuses on the diverse functions performed in the day-to-day operations of the mutual fund industry. You'll learn about: Front-office functions-analysis, buying, and selling. Back-office functions, including settlement, custody, accounting, and reporting. Commission structures-front-end loads, back-end loads, or level loads. The various fund categories used by the Investment Company Institute, Morningstar, and Lipper. The roles played by fund managers, investment advisors, custodial banks, distributors, transfer agents, and other third-party service providers. If you want a definitive reference on the mutual fund industry, this is the book for you.

From the Inside Flap A behind-the-scenes look at the mutual fund industry With more than 8,000 funds, more than \$8 trillion in assets, and more than 87 million individual investors at the end of 2004, mutual funds are professionally managed pooled investment vehicles that give people the opportunity to participate in the securities market without having to become money managers; they are very popular. This book focuses on open end funds, and gives you a comprehensive inside look at the mutual fund industry, including real-life examples of how specific functions are performed at various firms. You'll explore industry history and structure, investment management, portfolio operations, accounting, auditing, legal compliance, customer service, distribution, globalization, and e-commerce. You'll also learn about the cost of various mutual fund operations; both to the fund companies and to investors. Mutual Fund Industry Handbook does not provide information about how to select mutual funds or delve into specific funds or categories of funds. Rather, it describes every facet of mutual fund operations in an accessible and easy-to-understand manner. It also objectively addresses controversial topics, such as the fees that funds charge investors, disclosure requirements, advertising, active versus passive management, responsibilities of fund directors, and recent scandals, including illegal late trading and market timing. Mutual Fund Industry Handbook concludes with a discussion of trends and conditions that can impact the industry. Whether you're an investment professional looking to improve your mutual fund knowledge or an investor who wants to understand what goes on behind the scenes throughout the mutual fund industry, this is the resource for you. From the Back Cover Praise for the Mutual Fund Industry Handbook "The Mutual Fund Industry Handbook is a remarkably important work . . . I am profoundly impressed by the broad and comprehensive sweep of information and knowledge that this book makes available to industry participants, college and business school students, and anyone else with a serious interest in this industry." -- From the Foreword by John C. Bogle President, Bogle Financial Markets Research Center Founder and former chief executive, The Vanguard Group A Foreword by John C. Bogle, founder of The Vanguard Group and one of the most respected leaders in the mutual fund industry, sets the stage for this authoritative book that explains the complexities of the phenomenal industry in simple terms. Investors like the fact that mutual funds offer professional management, easy diversification, liquidity, convenience, a wide range of investment choices, and regulatory protection. Mutual Fund Industry Handbook touches on all of those features, but it also focuses on the diverse functions performed in the day-to-day operations of the mutual fund industry. You'll learn about: Front-office functions-analysis, buying, and selling Back-office functions, including settlement, custody, accounting, and reporting Commission structures-front-end loads, back-end loads, or level loads The various fund categories used by the Investment Company Institute, Morningstar, and Lipper The roles played by fund managers, investment

advisors, custodial banks, distributors, transfer agents, and other third-party service providers. If you want a definitive reference on the mutual fund industry, this is the book for you.

About the Author LEE GREMILLION is a former partner at PricewaterhouseCoopers where he provided operations and systems expertise to many U.S. mutual funds, insurance companies, investment managers, pension administrators, and banks. He earned a doctoral degree from Harvard Business School and was professor of management information systems at Indiana University and Boston University. Dr. Gremillion worked for IBM and The Colonial Group, Inc., before joining PricewaterhouseCoopers.

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THE NATIONAL INVESTMENT COMPANY SERVICE ASSOCIATION (NICSA) is a not-for-profit trade association serving the operations sector of the mutual fund industry worldwide. NICSA provides leadership, education programs, and information exchanges to its members, which consists of over 400 companies worldwide.