Investment Manager Analysis: A Comprehensive Guide to Portfolio Selection, Monitoring and Optimization
Frank J. Travers

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DESCRIPTION

Praise for Investment Manager Analysis

“This is a book that should have been written years ago. It provides a practical, thorough, and completely objective method to analyze and select an investment manager. It takes the mystery (and the consultants) out of the equation. Without question, this book belongs on every Plan Sponsor's desk.”
—Dave Davenport, Assistant Treasurer, Lord Corporation, author of The Equity Manager Search

“An insightful compendium of the issues that challenge those responsible for hiring and firing investment managers. Frank Travers does a good job of taking complicated analytical tools and methodologies and explaining them in a simple, yet practical manner. Anyone responsible for conducting investment manager due diligence should have a copy on their bookshelf.”
—Leon G. Cooperman, Chairman and CEO, Omega Advisors, Inc.

“Investment Manager Analysis provides a good overview of the important areas that purchasers of institutional investment management services need to consider. It is a good instructional guide, from which search policies and procedures can be developed, as well as a handy reference guide.”
—David Spaulding, President, The Spaulding Group, Inc.
“This book is the definitive work on the investment manager selection process. It is comprehensive in scope and well organized for both the layman and the professional. It should be required reading for any organization or individual seeking talent to manage their assets.”
—Scott Johnston, Chairman and Chief Investment Officer, Sterling Johnston Capital Management, LP

"Investment Manager Analysis is a much-needed, comprehensive review of the manager selection process. While the industry is riddled with information about selecting individual stocks, comparatively little has been written on the important subject of manager selection for fund sponsors. This is a particularly useful guide for the less experienced practitioner and offers considerable value to the veteran decisionmaker as well.”
—Dennis J. Trittin, CFA, Portfolio Manager, Russell Investment Group

ABOUT THE AUTHOR

Frank J. Travers, CFA, is a Principal and Senior Portfolio Manager at Pine Street Advisors, LLC, where he is responsible for co-managing a diversified hedge fund-of-funds product. Previously, he was a managing director and director of research at CIC Group, Inc., where he managed a family of eight fund-of-funds, and acted as the portfolio manager for the firm’s U.S. small-cap equity portfolio. Frank was also the director of manager research at CIBC World Markets, where he was responsible for investment manager due diligence for the firm’s North American wrap program. His research papers and articles have been published in the Journal of Investing, Institutional Investor’s Guide to Small Cap Investing, and Plan Sponsor.

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