



Mutual Funds: An Introduction to the Core Concepts

By Mark Mobius

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Mutual Funds: An Introduction to the Core Concepts By Mark Mobius

Each book in the series cuts through the jargon and mystique of the financial markets to give the reader a clear picture of how and why these markets function as they do.

Key features include:

- clear definitions of financial terms
- worked examples of transactions and contracts
- summaries and overviews
- valuation techniques
- quick Quiz questions to reinforce the learning experience
- strip cartoons to explain complex trades
- entertaining cartoons from Alex to lighten the load
- war stories and anecdotes from Mark Mobius based on his remarkable experiences
- other Resources section to guide the reader to other useful books, websites and reference material

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Editorial Review

From the Inside Flap

Mark Mobius is widely acknowledged as one of the world's most astute investment professionals. His work as a leading emerging markets fund manager has earned him numerous accolades and global recognition.

In this introductory series, Dr. Mobius guides the novice investor through all aspects of mutual funds. *Mutual Funds: An Introduction to the Core Concepts* gives an in-depth understanding of mutual fund structure, the benefits of owning funds, how to build a portfolio of mutual funds and how to evaluate its performance.

Mutual Funds: An Introduction to the Core Concepts translates industry jargon into layman's terms, exploring all important concepts to help even beginner investors make informed decisions about their investments.

Highlights of the book include detailed coverage of:

- the history of mutual funds
- different types of funds, including open and closed-end, equity, bond and money market funds
- the structure of mutual funds
- techniques for selecting the right types of funds
- strategies for buying and selling funds
- the latest industry trends and growth drivers
- how to determine a fund's risk and investment style
- how to calculate return on investments
- how to evaluate fund costs
- how to interpret a fund prospectus, annual report and other documents
- how to analyze mutual fund performance

This straightforward book offers a comprehensive, easy-to-follow guide that will give investors the confidence to build a portfolio and choose among the thousands of mutual fund offerings available in this rapidly growing industry.

From the Back Cover

"Students, investors and entrants to the business will find *Mutual Funds: An Introduction* to be a lively, practical and highly informative overview of one of the world's most important financial products. One could not ask for a better guide to the world of mutual funds than Mark Mobius, truly a legendary figure in global asset management."

—**Paul Schott Stevens**, President, Investment Company Institute

"In this Masterclass work, Mark Mobius, well-known as one of the world's master investors, provides us with a lively and comprehensive understanding of mutual funds...By adding material from different real world examples, the introductory content comes alive and provides a current and valuable view on the subject of mutual funds and the mutual fund industry. This book can be highly valuable for investors, brokers and students who would like to ensure that they have a thorough understanding of both the relevant core concepts and a useful sector history."

—**Mark Daniell**, Chairman, Cuscaden Group Pte Ltd.; Vice-Chairman, Aquarius Investment Advisors Pte

Ltd.;Director Emeritus, Bain & Company

"This book, by one of the most successful and experienced fund managers in the world, is a highly practical and interesting introduction to the subject of mutual funds. It will be very useful in investment and fund management courses at the undergraduate and MBA levels. Those who are investing their own money or who have responsibility for overseeing the investment of funds in various types of organisations will also find this book useful in arming them with the basic knowledge necessary to engage in more informed discussions with their fund managers."

—**Associate Professor Mak Yuen Teen**, Director, Corporate Governance and Financial Reporting Centre, NUS Business School, National University of Singapore

"Everything one needs to know about mutual funds (unit trusts) is contained in this comprehensive book by Mark Mobius. It is easy to read and clearly set out, with interesting sidebars and news clips as well as helpful summaries, review questions, and glossary....Anyone who reads this book would be well equipped not just to make informed investment decisions for themselves, but also to become a professional fund manager able to craft cross-border and multi-asset investment strategies for clients."

—**Jeremy Bolland**, Author of *Writing Securities Research – A Best Practice Guide*

About the Author

Mark Mobius, Ph.D., managing director, joined Templeton in 1987 as president of the Templeton Emerging Markets Fund, Inc. He currently directs the analysts based in Templeton's 12 emerging markets offices and manages the emerging markets portfolios. Dr. Mobius has spent more than 30 years working in emerging markets all over the world.

Dr. Mobius earned his bachelors and masters degrees from Boston University and a Ph.D. in Economics and Political Science from the Massachusetts Institute of Technology. He is the author of the books *Trading With China*, *The Investor's Guide to Emerging Markets*, *Mobius on Emerging Markets* and *Passport to Profits*.

Dr. Mobius has received the following awards: *Emerging Markets Equity Manager of the Year 2001* by International Money Marketing, *Top Ten Money Managers of the 20th Century* in a survey by the Carson Group in 1999, *Number One Global Emerging Market Fund* in the 1998 Reuters Survey, *1994 First in Business Money Manager of the Year* by CNBC, *Closed-End Fund Manager of the Year* in 1993 by Morningstar, and *Investment Trust Manager of the Year 1992* by *Sunday Telegraph*. He was named in 2006 by *Asiamoney* magazine as one of *Top 100 Most Powerful and Influential People*. *Asiamoney* said: "Boasts one of the highest profiles of any investor in the region and is regarded by many in the financial industry as one of the most successful emerging markets investors over the last 20 years. Despite tough times during the financial crisis nine years ago, he still commands a strong following in the investment world and is influencing the direction of billions of investment dollars". He was appointed Joint Chairman of the Global Corporate Governance Forum Investor Responsibility Taskforce of the World Bank and Organization for Economic Cooperation and Development.

Users Review

From reader reviews:

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Do you have favorite book? In case you have, what is your favorite's book? Book is very important thing for us to learn everything in the world. Each e-book has different aim or perhaps goal; it means that publication has different type. Some people feel enjoy to spend their the perfect time to read a book. They are reading whatever they acquire because their hobby is reading a book. How about the person who don't like reading a book? Sometime, particular person feel need book once they found difficult problem or perhaps exercise.

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