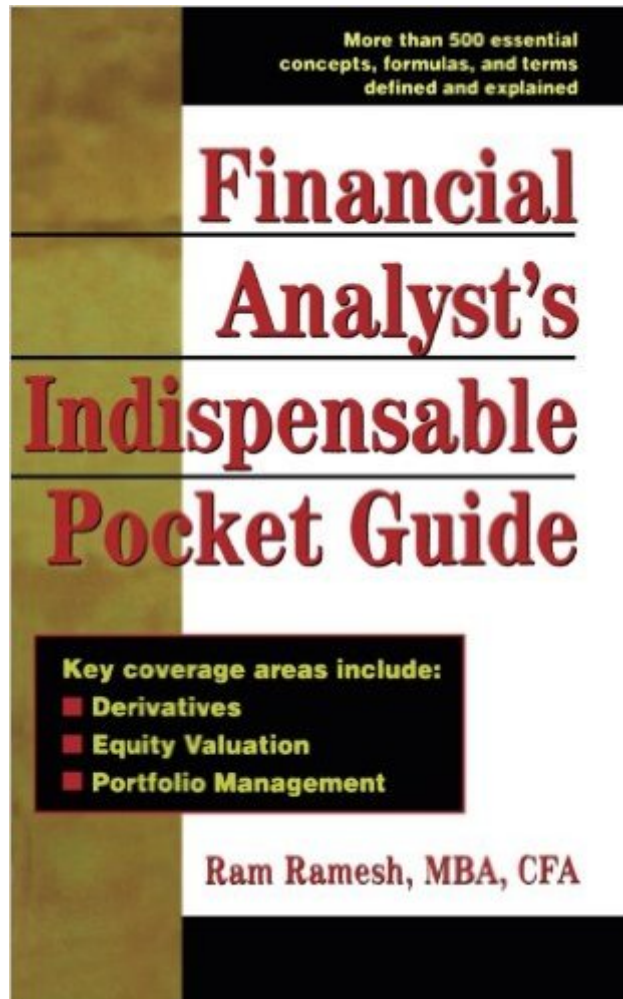


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# Financial Analyst's Indispensable Pocket Guide



## Synopsis

Financial Analysts' Indispensable Pocketguide is the first reference to give the more than 20,000 candidates who take AIMR-administered CFA exams annually and the 60,000-plus CFAs and finance professionals who currently practice investment management a single broad-based resource for specific terminology and information. Much more than just a dictionary, this dynamic book explains and expands upon the fundamental concepts that comprise a financial analysts' lexicon. Within each section, Ramesh arranges fundamental terms alphabetically, then provides CFA-related tips and profiles of industry leaders. Key topics include:

- \*Timeless tips for CFA candidates and practitioners
- \*Graphics and mnemonics to help with important concepts
- \*Derivatives, equity valuation, and portfolio management

## Book Information

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## Customer Reviews

This is the only book of its kind, so far. The author compiled this pocket guide after completing his CFA program and realising that the vast concepts, terms and designations learnt were soon being forgotten. That being the case, candidates of, as well as those who have completed, the CFA program would find this book a useful one-stop guide to all those concepts, terms and designations learnt in the pursuit of the CFA designation. The book is arranged broadly around the various topics of the CFA program i.e. Quantitative Methods, Economics, Financial Statements Analysis, Equities, Fixed Income, Derivatives, Real Estate, Portfolio Management, Ethics, Behavioural Finance. As such, the CFA candidate would find this book more useful than say, a general finance/business masters student. But I reckon that this book, though published as recent as this year, is already in

need of an update. The CFA syllabus is constantly evolving. As a result, a number of concepts in say, Level 1 of the CFA Program, are not found in this book. Also, a number of the textbooks used in the CFA program which the author had based his book on, have either been superseded by newer editions or replaced all together. All in all, I found this to be a useful book and a unique concept. Until a better book comes along, I will be using this book religiously to prepare for the CFA exams as well as to refresh my memory.

I'm not a CFA candidate, but I've been an investor for years and always appreciate learning more about the field. My father was president of the CFA for a couple of years, and after 15 years working on Wall Street I have a reasonably broad understanding of some finance. What impressed me most about the book was how short and terse the definitions were. Clearly they are useful and present good insight into what's important and why. What impressed me least was the lack of mathematical rigour (perhaps one can't have both brevity and exactness?). For example, many of the formulas only work for specific instances, and details about yield/rate conventions are omitted. Overall, it struck me as useful overview and quick reminder to financial analysis and the language/terms used. It's not really indispensable, and is not authoritative. But for a quick refresher, or ballpark estimates it's fine.

As a CFA candidate, I find this to be a useful summary of the key concepts that we are taught during the course of the programme. However, regard it as more of a "Cliff's Notes" of the programme -- with all its inevitable shortcomings -- but a handy little reference piece nonetheless. After completion of the programme and years down the road, I am sure that I will find it quite useful in helping to jog my memory and the sleepless nights that the CFA programme gave me! -- I hope, however, that a revised version will be introduced and perhaps with a less odd title. It is not a book for everyone, but anyone who wishes that s/he had made notes whilst studying for the CFA programme will find this book useful.

I've always looked at books that summarize difficult subject with a skeptical eye but this book is much different. It covers all the terms and definitions from the basics to the grad school level. Not only does the book cover many of the more difficult concepts it also sprinkles in some great case studies to put the words and definitions in context. In summary, this is a great book for everyone that has a deep hunger to get exposed to some complicated terms.

This is a great, short reference item (as its title would indicate). It touches on all major topics for finance (particularly for the CFA exam) and is arranged in an intuitive and logical manner. The book itself is a bit on the simplistic side, but that's to be expected given its brevity. Within each subcategory (such as fixed income or derivatives) the topics are arranged much like an index in alphabetical order, which can be confusing sometimes if you're just trying to read through the book, but is appropriate as a quick-and-dirty reference guide. Again, it depends on what you want this book for. As intended, it's terrific. If you want it to do more, then maybe you should buy additional materials to supplement it so that you better understand the frameworks within which its listed specific terms/concepts fit.

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