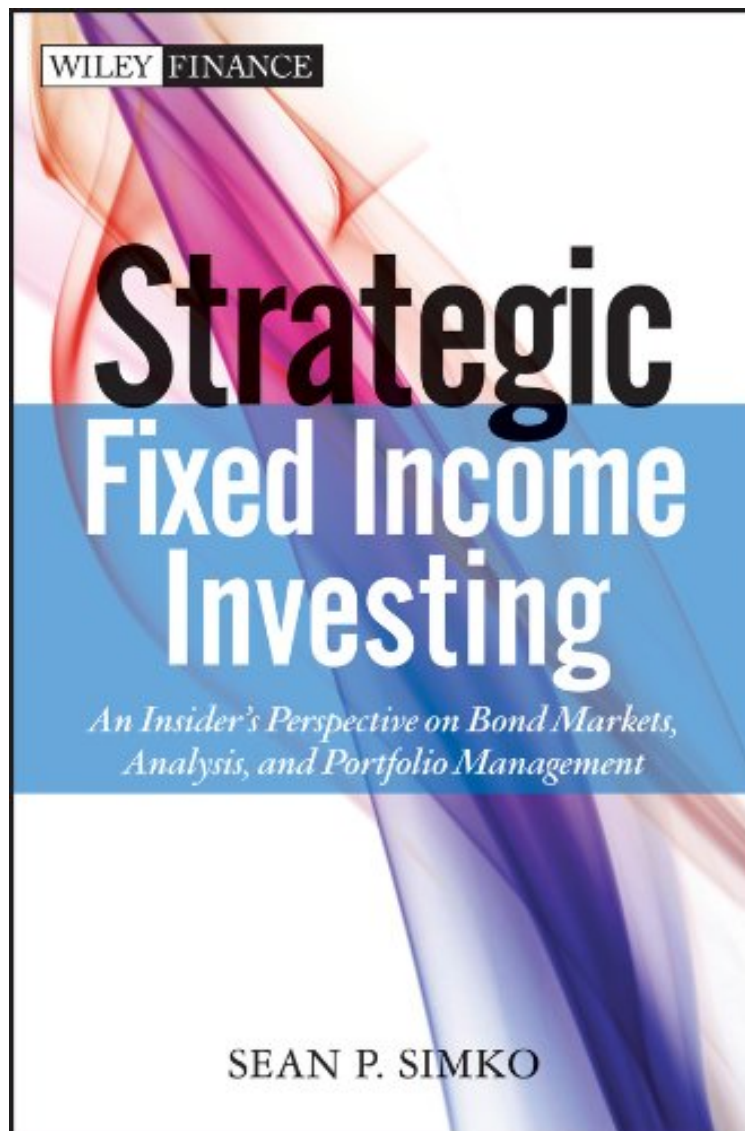


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Strategic Fixed Income Investing: An Insider's Perspective on Bond Markets, Analysis, and Portfolio Management (Wiley Finance)

Sean P. Simko

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Sean P. Simko : Strategic Fixed Income Investing: An Insider's Perspective on Bond Markets, Analysis, and Portfolio Management (Wiley Finance) before purchasing it in order to gage whether or not it would be worth my time, and all praised Strategic Fixed Income Investing: An Insider's Perspective on Bond Markets, Analysis, and Portfolio Management (Wiley Finance):

4 of 5 people found the following review helpful. A big disappointment!By StraightForwardAfter reviewing the table

of contents, I was looking forward to receiving this book, thinking that it might help me expand my knowledge of fixed income investing. However, instead, I found chapter after chapter of very, very general information on fixed income markets, most of which I read, as it was happening, in the news. There is little, or no, meaningful discussion about fixed income investing strategy. Don't waste your time or money on this book. 1 of 2 people found the following review helpful. A must read for fixed income investors and asset managers

By Roland Vigue

The author demystifies the complex fixed income market in an easy-to-read fashion. As an investor, this book provides a straightforward approach for managing my fixed income investments - from defining investment objectives to portfolio construction and risk management. The author's investment methodology is geared toward weathering the toughest market conditions - something that is much needed given today's global economic environment. In summary I found this book to be an excellent reference - one that would be highly useful for average and seasoned investors as well as asset managers. It's a reference I plan to keep close at hand.

Build a fixed income portfolio that will weather volatility and instability

Designing a fixed income portfolio is an essential skill of any investment manager or advisor. This book outlines the critical components to successfully navigate through stable and turbulent markets, using real-life lessons from a seasoned institutional asset manager. The first section includes commentary on the changing fixed income market and overall economy, while the second section outlines the processes to navigate these ever-evolving markets including portfolio construction, the Federal Reserve, credit analysis and trade execution. Ladder Methodology is highlighted and the book discusses its pros and cons, gives examples of both well-constructed and poorly executed laddered bond portfolios and offers alternatives to traditional asset classes. Benefit from lessons learned, providing real life examples of market scenarios and trades

Prepare fixed income portfolios that can weather any storm

Written by Sean P. Simko, an expert on fixed income investing, who shares his investing experiences from the past 16 years

Outlines the key principles of the Ladder strategy

From strategy to execution, Strategic Fixed Income Investing offers the road map to help investment managers prepare portfolios that will insulate investments against adverse market conditions.

From the Inside Flap

Fixed income investing is often unduly subject to the whims of inflationary economic forces, and, at best, serves a minor risk-management function. At least, that's the perception of most investors. But, according to consummate industry insider Sean Simko, nothing could be further from the truth. A well-constructed fixed income portfolio, says Simko, offers the promise of reliably consistent returns, even in the most turbulent and unpredictable market environments. Which is why knowing how to build and strategically manage one is a skill every investment manager and financial advisor surely needs to master. In Strategic Fixed Income Investing, Simko draws upon his many years of experience as a successful global fixed income portfolio manager, with over 7 billion in assets under management, to share valuable lessons he has learned about creating a fixed income portfolio built to help weather any storm. He offers priceless insights into and methods for accurately sounding prevailing economic conditions, with an eye to identifying and investing in the most appropriate asset classes for every economic climate, whether its sovereign bonds, munis, T-bills, money markets or ABSs. The first part of Strategic Fixed Income Investing explores recent changes in the fixed income markets, as well as recent and emerging economic and political trends and their implications for fixed income investors. With a laser focus and taking "expect the unexpected" as his motto, Sean Simko pursues a wide-ranging discussion covering everything from early warning signs of the 2008 financial collapse to the ongoing debt ceiling debates in Congress, the Federal Reserve, and the vagaries of monetary policy to loss of confidence in the AAA rating and the demise of Lehman Brothers. In Part Two, Simko delineates a number of highly successful methodologies for navigating the ever-evolving fixed income markets. With the help of numerous case studies and real-world examples, he describes an array of tested-in-the-trenches portfolio construction and asset allocation strategies, as well as powerful analytic techniques. Foremost among the strategies he prescribes is the ladder strategy, which can help mitigate interest rate risk. Put in the simplest of terms, laddering entails evenly investing in bonds in different maturities, over a set time frame. As Simko vividly illustrates with examples drawn from his personal investing experience and from recent history, a well-orchestrated ladder strategy can help insulate a portfolio from the most adverse market conditions, while providing a consistent annual income stream, regardless of the interest rate environment or market cycle. Offering an unparalleled opportunity to learn from a noted expert in the field, Strategic Fixed Income Investing is your best hedge against the flux and uncertainty of today's financial markets and the mounting instability of the global economy.

From the Back Cover

Praise for Strategic Fixed Income Investing "In Strategic Fixed Income Investing, Sean provides a thoughtful map that allows investors to navigate a complex marketplace during extraordinary times. The structure of his discussion nicely blends a broad overview of this security class with a detailed explanation of important fixed income investing concepts which should make it an investment text with staying power." —Drew T. Matus, a Senior Economist at UBS "Sean's clear and concise strategies for the fixed income investor draws on his understanding of how markets work — an understanding that has been informed by and has weathered some of the roughest financial waters this generation has seen. Strategic Fixed Income Investing is a road map for navigating the headwinds that come with this asset class. From goal setting to portfolio

building to trade execution—his tested approach is a must-read for asset managers and the sophisticated investor." —Mary Caraccioli, host of Mary Talks Money on ABC-TV's Live Well Network "Sean Simko's book *Strategic Fixed Income Investing* is an easy read for the savvy individual investor and a must-read for all financial advisors. Mr. Simko's book provides an easy-to-follow road map to fixed income investing. As a CPA and financial advisor, I will likely use Mr. Simko's book time and again as a bedrock reference when developing a fixed income strategy for my clients." —Ryan C. Todd, CPA, Todd Todd LLP

About the Author Sean P. Simko is the Head of Fixed Income Portfolio Management at SEI, and a sought-after expert on fixed income investing and the financial markets. He leads a team of investment professionals responsible for research, analysis, implementation, and ongoing portfolio management of over \$7 billion of fixed income strategies. Prior to joining SEI, Mr. Simko was vice president and portfolio manager for Weiss Peck Greer Investments and was responsible for managing approximately \$6 billion in assets through various strategies including short duration, tips, structured products, futures, and currencies. Mr. Simko has appeared on Bloomberg TV and radio and frequently on Money Matters, and he is regularly quoted in the Wall Street Journal and other mainstream publications. He has written numerous articles for financial magazines, including most recently, December's issue of *Investment Advisor*.