



Investment Leadership and Portfolio Management: The Path to Successful Stewardship for Investment Firms

By Brian D. Singer, Greg Fedorinchik

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An industry leader candidly examines the role of investment leadership in portfolio management

Investment Leadership & Portfolio Management provides a top down analysis of successful strategies, structures, and actions that create an environment that leads to strong macro investment performance and rewarding investor outcomes. By examining how to manage and lead an investment firm through successful investment decision-making processes and actions, this book reveals what it will take to succeed in a radically changed investment landscape. From firm governance and firm structure-for single capability, multi-capability, and investment and product firms-to culture, strategy, vision, and execution, authors Brian Singer, Barry Mandinach, and Greg Fedorinchik touch upon key topics including the differences between leading and managing; investment philosophy, process, and portfolio construction; communication and transparency; and ethics and integrity.

- Leadership issues in investment firms are a serious concern, and this book addresses those concerns
- Details the strong correlation between excellence in investment leadership and excellence in portfolio management
- Written by a group of experienced professionals in the field, including the Chairman of the CFA Institute Board of Governors

Understanding how to operate in today's dynamic investment environment is critical. *Investment Leadership & Portfolio Management* contains the insights and information needed to make significant strides in this dynamic arena.



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Editorial Review

From the Inside Flap

The new breed of investment professional knows that there is a strong correlation between excellence in investment leadership and excellence in portfolio management—and in this book, a group of experienced investment industry experts puts this paradigm in perspective.

Investment Leadership and Portfolio Management provides a top-down analysis of successful strategies, structures, and actions that create an environment for generating strong investment performance and, most importantly, delivering rewarding investor outcomes. By examining how to manage and lead an investment firm through successful investment decision-making processes, this reliable resource reveals what it takes to excel in a radically changed investment environment. Additionally, it includes informative case studies of the approach in action, so you can see the real applications of the ideas addressed throughout these pages.

From firm governance and structure for investment and product firms to culture, strategy, vision, and execution, authors Brian Singer—Chairman of the CFA Institute Board of Governors—and Greg Fedorinchik touch upon pressing issues, including the differences between leading and managing; investment philosophy, process, and portfolio construction; communication and transparency; and ethics and integrity. Along the way, you'll also become familiar with:

- The role of behavioral biases and market behavior analysis in the investment decision-making process
- The appropriate incentive structures and fee models for asset management firms
- The practical considerations required for living organizational values, setting goals, and measuring organizational success
- The details involved in developing a merito-cratic investment process that rewards individual contributions
- And much more

There is no one-size-fits-all approach to leading a diverse group of intelligent individuals and the firms they represent. However, there are a few best practices and rules that can make the task a more manageable one. With the ideas articulated in Investment Leadership and Portfolio Management, you'll gain a better understanding of how to effectively operate within today's competitive investment industry and achieve a significant level of success.

From the Back Cover

Praise for Investment Leadership and Portfolio Management

"This short book packs a lot of wisdom about portfolio management. It demonstrates the importance of firm culture and longer time horizons to successful investing, while putting forward a truly creative approach to performance fees."—Bob Pozen, Chairman, MFS Investment Management

"Singer and Fedorinchik have added an important book to the library of investment leaders. They drill deep into the question of product-driven vs. investment-driven firms, covering important foundational topics like vision, mission, culture, compensation, and fee structures. When serious practitioners like these three take the time to write about best practices, the result is a book that rings true. Full of practical ideas that are

supported by a deep understanding of the underlying financial theories and lots of real-world, front-line experience. A must-read for all investment professionals who are committed to 'getting it right' in this post-crisis environment."—James Ware, CFA, author of *High Performing Investment Teams*, founder of Focus Consulting Group

"In an exceptional and decidedly unique style, *Investment Leadership and Portfolio Management* deserves special attention from any investor. The authors weave a wonderful mosaic of the investment management landscape that is both different from other investment books and compelling in its focus on the truly relevant issues. The case studies and references to actual experiences make this book an enjoyable read and, equally important, provide long-sought attention to the factors that really matter in the quest for investment performance."—Gary P. Brinson, President, GP Brinson Investments

"Singer and Fedorinchik have laid out a clear vision of the modern, post-crisis asset management firm in which the interests of the investment professionals, the firm and the end client are fully aligned. This book combines decades of practical experience with original insights from portfolio and behavior theory, in equal measures of wit and wisdom."—Donald M. Raymond, PhD, CFA, Senior Vice President, Public Market Investments, Canada Pension Plan Investment Board

About the Author

BRIAN SINGER is Chief Investment Officer of Singer Partners and Chairman of the CFA Institute Board of Governors. Previously, he was head of global investment solutions at UBS Global Asset Management (formerly Brinson Partners, Inc.), responsible for asset allocation and currency strategies. Singer is also Emeritus Board Member of the Research Foundation of CFA Institute and an advisory board member of the Journal of Performance Measurement. He is a recipient of the 1991 Graham and Dodd Award and a 2001 recipient of the Dietz Award. Singer holds an MBA from the University of Chicago.

GREG FEDORINCHIK is head of investor solutions at Mesirow Advanced Strategies, Inc., an institutional fund of hedge funds firm based in Chicago. Prior to joining Mesirow, he was a senior strategist with the global investment solutions team at UBS Global Asset Management (formerly Brinson Partners, Inc.) and a member of the asset allocation and currency committee. Fedorinchik holds an MBA from the Kellogg School of Management, Northwestern University.

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