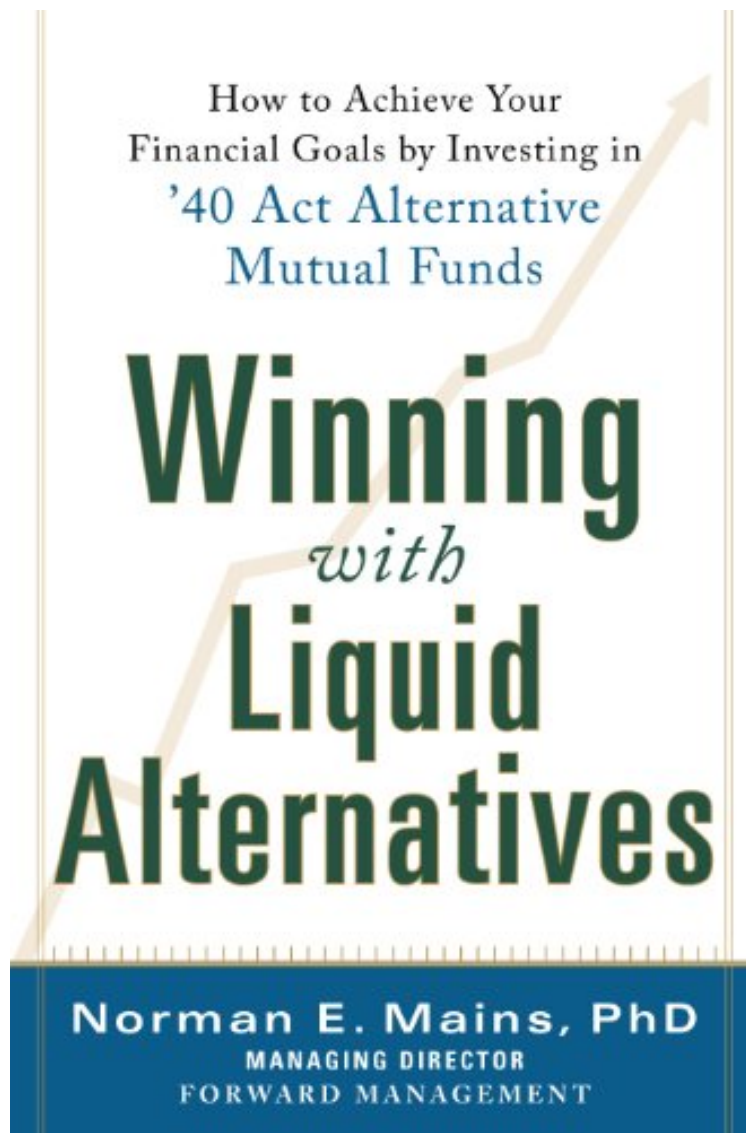


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Winning With Liquid Alternatives: How to Achieve Your Financial Goals by Investing in rsquo;40 Act Alternative Mutual Funds

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Complex Text
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The writing style and the content were very high-style academic in nature. The definitions are very complex and I did not understand much of what the author was attempting to put forth. The "liquid alternatives" are especially not liquid as they belong in a portfolio as a risk flattener, not a strategy that could be said to "win" as a short term interpretation. It certainly does not belong on a list of popular investment books. It does belong on a reading list in a graduate course in finance and to be available on university library shelves. The main lesson I obtained from reading much of the book is that, before an investor buys into the '40 Act strategies, he/she had better find a fund manager with a long record of successful investing and a recognized reputation with a seasoned understanding of financial markets.
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Authoritative perspective on the history and application of liquid alternatives (alternative mutual funds). The author discusses not only what they are, but how they can be used to compliment the overall portfolio. Good read for those interested in exploring the space.
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How new and fast-proliferating mutual funds and ETFs can put a backbone in your portfolio
Until recently, only the very wealthiest individual investors have been able to access the alternative strategies that major institutions rely upon to help them reduce portfolio risks and meet investment targets. But now all that is changing, thanks to liquid alternatives. The term, "liquid alternatives," refers to a new breed of mutual funds and ETFs that combine the sophisticated, goal-driven strategies of the hedge fund world with the daily liquidity, regulatory oversight, and accessibility of mutual funds. The rise of these hybrid investment vehicles rewrites the playbook for investors who want portfolio tools that are more robust than standard-issue stocks and bonds, but who can't meet the net worth tests or afford the high minimums required to invest in hedge funds (the vehicle in which alternatives have traditionally been packaged). Written by a seasoned expert in alternatives research and product development, *Winning with Liquid Alternatives* gives investors tools to understand, evaluate, and use these new investment vehicles. In a clear, straightforward style, this action-oriented guide provides: A historical framework tracing the evolution and later convergence of the hedge fund and mutual fund industries. Evidence showing the results that major investors have achieved with alternative investments. Performance, risk, and cost comparisons for hedge funds and mutual funds. An overview of available liquid alternatives and the types of strategies they employ. Portfolio construction concepts, such as risk budgeting, for putting liquid alts to work. Practical tools for researching and selecting the strategies that best fit your goals, deciding how much to allocate to alternatives, and building them into your overall portfolio. Investors no longer need to be passive in the face of volatile stock and bond markets. Readers of *Winning with Liquid Alternatives* will learn new ways to "weatherproof" their portfolios and advance toward their individual financial goals.

About the Author
NORMAN E. MAINS, PhD, is managing director, head of New Product Innovation, and chief risk officer at Forward, a San Francisco-headquartered money management firm that is an industry leader in the origination, structuring, and managing of '40 Act alternative mutual funds.