



INVESTMENT READING LIST

& General Books *(In Order Of Priority)*

- **Winning At A Losers Game* By Charles Ellis
- **Unconventional Success* By David Swensen
- **The Wall Street Self-Defense Manual* By Henry Blodget
- **Common Sense On Mutual Funds* By John Bogle
- **Four Pillars Of Investing* By William Bernstein
- **The Only Three Questions that Count* By Kenneth Fisher
- **The Big Investment Lie* By Michael Edesess
- **The Prudent Investor* By Bowes & Goldie
- **The Secret Code Of The Superior Investor* By James Glassman
- **Pioneering Portfolio Management* By David Swensen
- **The Intelligent Asset Allocator* By William Bernstein
- * *Behavioral Finance & Wealth Management* By M.M. Pompian
- **Beyond Greed And Fear* By Hersh Shefrin
- **Navigating The Noise* By R. Bernstein
- **Data Driven Investing* By Bill Matson
- **Beyond Wall Street* By Mintz, Dakin & Willison
- * *Index Funds* By Mark Hebner
- **The Great Mutual Fund Trap* By Baer & Gehsler
- **Rational Investing* By Larry E. Swedroe
- **Investment Philosophies* By Aswath Damodaran
- **Capital Ideas - Evolving* By Peter Bernstein
- **Winning Investment Strategy* By Larry E. Swedroe
- **What Wall Street Doesn't Want You To Know* By Larry Swedroe
- **Contrarian Investment Strategies* By David Dreman
- * *The Unbeatable Market* By Ron Ross
- * *Competition Demystified* by Bruce Greenwald
- **Value Investing* By Bruce Greenwald
- **Investment Gurus* By Peter Tanous
- **On Investing* By John Neff
- **More Than You Know* By Michael J. Mauboussin
- **Random Walk Down Wall Street* By Burton Malkiel
- **Random Walk Guide to Investing* By Burton Malkiel
- **Index Your Way To Investment Success* By Good & Hermansen
- **The Future for Investors* By J.J. Siegel
- **Stocks For The Long-Run* By J.J. Siegel
- **Capital Ideas* By P. Bernstein
- **When Genius Failed* By R. Loewenstein
- **Irrational Exuberance* By Robert Shiller
- **The Index Fund Solution* By Evans & Malkiel
- **Global Bargain Hunting* By Malkiel & Mei
- **Original Ideas From The Greatest Minds* By Charles Ellis
- **Competitive Strategy* By Michael Porter
- **Capital Ideas & Market Reality* By Bruce Jacobs
- **Exchange Traded Funds* By Wiandt & McClatchy
- **The Psychology Of Money* By Jim Ware
- **The Psychology Of Investing* By Lifson & Geist
- **Profiting From An Investment Revolution* By Peter Tanous
- Stop Buying Mutual Funds* By Mark Heinzl
- Investment Psychology Explained* By Martin Pring
- Against The Gods: "The Story Of Risk"* By Peter Bernstein
- The Warren Buffett Way* By Robert Hagstrom, Jr.
- The Intelligent Investor* By Benjamin Graham
- The Man Who Beats The S&P* By Janet Lowe
- New Finance: "The Case Against Efficient Markets"* By Robert Haugen
- Inefficient Stock Markets* By Robert Haugen
- Beast On Wall Street* By Robert Haugen
- Treasury of Investment Wisdom* By Dean LeBaron
- Classics I – An Investor's Anthology* By Charles Ellis
- Classics II – An Investor's Anthology* By Charles Ellis
- Investment Illusions* By Martin Fridson
- 25 Myths You Must Avoid* By Jonathan Clements
- Why Smart People Make Big Money Mistakes* By Belsky & Gilovich
- Manias, Panics And Crashes* By Charles Kindleberger

*A "Must Read" (plus 10 yrs experience) if you want to manage your own money

& Academic Books

- Active Indexing* By Schoenfeld
- Dynamic Portfolio Theory* By Richard Oberuc
- Equity Risk Premium* By Roger Ibbotson
- Economic Foundations Of Capital Market Returns* By AMIR
- History of the Theory of Investments* By Mark Rubinstein
- Investments* By Bodie, Kane & Marcus
- Investment Management* By Berstein & Damodaran
- Investment Management* By Hagin
- Investment Analysis & Portfolio Management* By Reilly
- Investment Style Handbook* By F. Fabozzi
- Modern Investment Theory* By Robert Haugen
- Managing Investment Portfolios* By Manginn & Tuttle
- Professional Perspectives On Indexing* By F. Fabozzi
- Modern Investment Management* By B. Litterman

Great Investment Minds

- Charles Ellis** - Focuses on what is important. He is brilliant in his simplicity.
- William Sharpe** - Noble Prize winner for his work on portfolio theory.
- John Bogle** – Bogle is considered "The Father of Index Funds".
- Peter Bernstein** – Editor of: "The Journal Of Portfolio Management".
- Burton Malkiel** - The leading "efficient-market" advocate.
- Gary Brinson** - Proved the importance of asset allocation.
- Rex Sinquefeld** - Passionate advocate of passive investing.
- Eric Kirzner** - University of Toronto Professor who is bringing indexing to Canada.
- Warren Buffett** - The World's second richest man and a legend in his own time.
- David Dreman** - Understanding human behavior in making investment decisions.
- David Swensen** – The man responsible for the spectacular success of Yale's endowment fund.

8 Useful Websites

- 8 www.vanguard.com Vanguard website (John Bogle)
- 8 www.efficientfrontier.com William Bernstein's website
- 8 www.morningstar.com Morningstar's website
- 8 www.dfaus.com (Dimensional Financial)

Websites on Exchange Traded Index Units (ETFs):

- 8 www.amex.com Information on all ETFs listed on Amex. A great site!
- 8 www.ishares.com Barclay's site for its 60-odd U.S. funds, called iShares. A good site.
- 8 www.spdrindex.com Data on select sector SPDRs.
- 8 www.streettracks.com Details on ETFs run by State Street Global Advisors.
- 8 www.iunits.com Details on ETFs offered in Canada.
- 8 www.indexfunds.com News and views on U.S. ETFs and index funds in general.