



Balanced Asset Allocation: How to Profit in Any Economic Climate (Wiley Finance)

By Alex Shahidi

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The conventional portfolio is prone to frequent and potentially devastating losses because it is NOT balanced to different economic outcomes. In contrast, a truly balanced portfolio can help investors reduce risk and more reliably achieve their objectives. This simple fact would surprise most investors, from beginners to professionals. Investment consultant Alex Shahidi puts his 15 years of experience advising the most sophisticated investors in the world and managing multi-billion dollar portfolios to work in this important resource for investors. You will better understand why nearly every portfolio is poorly balanced and how to view the crucial asset allocation decision from a deeper, more thoughtful perspective. The concepts presented are simple, intuitive and easy to implement for every investor. Author Alex Shahidi will walk you through the logic behind the balanced portfolio framework and provide step-by-step instructions on how to build a truly balanced portfolio. No book has ever been written that discusses asset allocation in this light.

- Provides insights from a top-ranked investment consultant using strategies from the industry's brightest minds
- Proposes a balanced asset allocation that can achieve stable returns through various economic climates
- Introduces sophisticated concepts in very simple terms

For those who want to better manage their investment portfolio and seek a more advanced approach to building a balanced portfolio, *Balanced Asset Allocation: How to Profit in Any Economic Climate* provides an in-depth treatment of the topic that can be put to use immediately.

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Editorial Review

From the Inside Flap

"Portfolios are simply not well balanced. In fact, most portfolios are so inadequately balanced that the risks of underperformance are much greater than investors realize."—**From the Introduction**

Balanced Asset Allocation introduces the core concepts behind constructing a truly balanced portfolio, which is vastly different from the traditional 60 percent stock, 40 percent bond allocation. The emphasis is on understanding what fundamentally drives asset class returns and then building balanced portfolios based on these reliable relationships. The end result is a portfolio that is indifferent to the economic climate, in contrast to the conventional portfolio that is highly dependent on a strong economic outcome. Step by step, Alex Shahidi—a leading investment consultant—charts an investment strategy that is extremely simple, easy to implement, and gaining traction among the largest, most sophisticated investors in the world. The author also reveals how to avoid the most common investment tactics that expose portfolios to major, unanticipated risks.

Alex Shahidi analyzes the major asset classes through a new balanced portfolio lens. By viewing stocks, bonds, commodities, and other market segments through this fresh perspective, investors will likely reach a different, unconventional conclusion about the role of each asset class. Shahidi defines the specific steps for building a balanced portfolio and clearly demonstrates the benefits by providing long-term historical returns that support the core concepts presented. In addition to the text, the companion website serves as an ongoing resource.

For anyone who wants to manage an investment portfolio and appreciates the importance of maintaining an efficient asset allocation, *Balanced Asset Allocation: How to Profit in Any Economic Climate* offers an easy-to-approach, timeless examination of the topic that can be put to use immediately.

From the Back Cover

Praise for **Balanced Asset Allocation**

"Alex Shahidi's book is a magistral piece that will be enjoyed by anyone with a serious interest in investing and asset allocation. The intellectual rigor with which Shahidi leads the reader from beginning to end is breathtaking, debunking many preconceived ideas from the institutional world while coming up with many novel and often counterintuitive ones. Through an analysis of various economic environments (past and future), Shahidi dissects the shifting correlations (and inverse correlations) between various asset classes (equities, fixed income, inflation protected securities, commodities...). This book is most timely in today's deleveraging, and possibly low return, world."

—**Charles de Vaulx**, Chief Investment Officer and Portfolio Manager, International Value Advisers (IVA), and recipient of Morningstar's "International Stock Manager of the Year" award in 2001

"Building balance as described herein should be the foundation of all portfolios; this book is essential reading for any investor. Alex distills his comprehensive understanding of the economy, risk assets, and portfolio construction to its essence. The result is to make these valuable concepts accessible to a wide audience. Assimilating the wisdom in this book will increase the dependability of any portfolio."

—**Peter Joers, III**, Co-Founder, Greenline Partners; former Client Advisor at Bridgewater Associates

"For many investors the most critical decision they make is in choosing their default portfolio. Yet for how important this decision is, remarkably little that is useful has been written. Alex does a phenomenal job proposing a simple yet effective solution. *Balanced Asset Allocation* is one of those rare books that is both easy to read and provides great insights."

—**Nick Nanda**, Co-Founder, Kaleidoscope Capital; former Portfolio Manager on the Asset Allocation team at Grantham, Mayo, Van Otterloo & Co (GMO)

"There are many books on investing, but precious few that buck the consensus in a logical, well-argued manner. Read Alex Shahidi's book with an open mind and you are sure to become a better investor, even if you disagree with his unconventional analysis."

—**Samuel Lee**, Strategist, Morningstar

About the Author

ALEX SHAHIDI is a leading investment consultant managing multi-billion dollar portfolios. He focuses on advising large pension funds, foundations, endowments, and ultra-high-net-worth families, and is responsible for managing over \$13 billion in assets. Alex is a Chartered Financial Analyst Charterholder, Certified Investment Management Analyst, and a Certified Financial Planner. Since 2008, he has consistently been recognized as one of the top financial advisors in the country by national publications such as *Barron's*, *Worth*, and *On Wall Street*. His comments about asset allocation have been referenced in the *Wall Street Journal*, *MarketWatch*, *Money News*, and *Advisor Perspectives*.

Users Review

From reader reviews:

Elaine Moore:

Do you have favorite book? If you have, what is your favorite's book? Guide is very important thing for us to understand everything in the world. Each guide has different aim as well as goal; it means that guide has different type. Some people experience enjoy to spend their a chance to read a book. They can be reading whatever they have because their hobby will be reading a book. What about the person who don't like reading a book? Sometime, person feel need book after they found difficult problem or exercise. Well, probably you'll have this *Balanced Asset Allocation: How to Profit in Any Economic Climate* (Wiley Finance).

David Miller:

This *Balanced Asset Allocation: How to Profit in Any Economic Climate* (Wiley Finance) book is just not ordinary book, you have it then the world is in your hands. The benefit you obtain by reading this book will be information inside this book incredible fresh, you will get information which is getting deeper you actually read a lot of information you will get. This *Balanced Asset Allocation: How to Profit in Any Economic Climate* (Wiley Finance) without we realize teach the one who studying it become critical in pondering and analyzing. Don't end up being worry *Balanced Asset Allocation: How to Profit in Any Economic Climate* (Wiley Finance) can bring when you are and not make your case space or bookshelves'

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Sheila Davis:

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