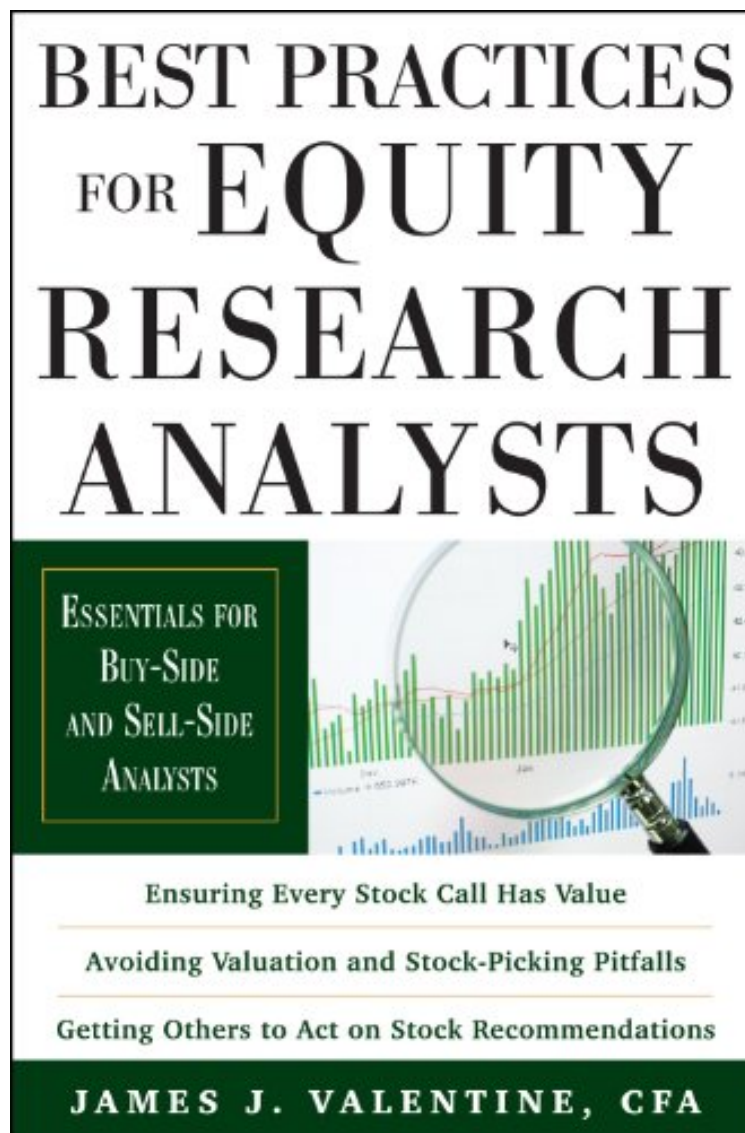


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Best Practices for Equity Research Analysts: Essentials for Buy-Side and Sell-Side Analysts

James J. Valentine

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contained within the CFA curriculum. The author's own experiences surely added more depth to the material. I would suggest that future editions contain a disc or web access to go into more detail on sections (autocorrelation in residuals, time series, etc..) and provide non analysts with the opportunity to run through exercises. Or consider exercises on one long valuation throughout the book running from top down, bottom up selection of sector and company. A fictional interview with management, running a history of numbers, forecast earnings..come up with various price multiples..and finally making a recommendation. I think that would give readers a more interactive experience and help to use those many Excel tricks. On the whole, I extracted some value from this book. 0 of 0 people found the following review helpful. Good practical book By Kras A practical book that covers a lot of ground. A lot of emphasis is put on communication. Overall good. 2 of 2 people found the following review helpful. Good Guide to Keep on Your Desk By Noah Roth This guide provides you many broad categories you need to think about on an equity research job, such as time management and interview skills with companies. However, just reading this book will not make you good at doing those things. It is not the kind of "knowledge books" filled with detail, examples and historical contexts. Instead, it is more like a step-by-step guide. Overall, it is a good book to be kept on the desk for reference.

The first real-world guide for training equity research analysts from a Morgan Stanley veteran Addresses the dearth of practical training materials for research analysts in the U.S. and globally Valentine managed a department of 70 analysts and 100 associates at Morgan Stanley and developed new programs for over 500 employees around the globe He will promote the book through his company's extensive outreach capabilities

About the Author James J. Valentine, CFA, has been an equity research analyst for Morgan Stanley, Salomon Brothers, Smith Barney, and PaineWebber. During his career, he also served as Morgan Stanley's associate director of North American research and its director of global training and development, where he was responsible for implementing new programs for more than 1,000 employees located in financial centers around the globe. For 10 consecutive years, Institutional Investor ranked him as one of the top three analysts within his sector. In 2006, Forbes named him one of the top three analysts among all 2,000 U.S. sell-side analysts that year. He has been recognized for his stock picking, earnings forecasts and client service from the Wall Street Journal, Thomson Reuters, Institutional Investor, and Greenwich Associates. He holds a Masters degree in finance and the Chartered Financial Analyst (CFA) designation. He lives in a Connecticut suburb of New York City with his wife and three children.