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# The Institutional ETF Toolbox: How Institutions Can Understand and Utilize the Fast-Growing World of ETFs (Bloomberg Financial)

By Eric Balchunas

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**The Institutional ETF Toolbox: How Institutions Can Understand and Utilize the Fast-Growing World of ETFs (Bloomberg Financial)** By Eric Balchunas

**Get up to speed on the booming innovation surrounding institutional ETF usage.?**

*The Institutional ETF Toolbox* is the institutional investor's guide to utilizing exchange-traded funds and taking full advantage of the innovative new products in their expanding repertoire. The ETF toolbox is expanding rapidly with nearly one new ETF launching every day this decade so far. As with any financial innovation, this phenomenon brings both opportunity and concerns, as well as a dire need for clarity and strong due diligence skills.

This book is both reference and resource, providing data-driven explanations backed by real-world market examples—alongside valuable insight from leading practitioners. Coverage includes an examination of the advantages and growth of ETFs as well as current and future uses of ETFs, emerging markets, and the strategic and tactical perspectives you need to effectively use ETFs to optimal effect. The major concerns surrounding ETFs are addressed in full to give you the background you need to formulate a better ETF strategy.

ETF allocations are expected to keep growing rapidly across all institutional types, and new and emerging products are becoming more and more liquid allowing easier expression of investment opinion. This book shows you how any investors can utilize these tools to strengthen your portfolio and safely expand into particularly appealing areas.

- Understand how the ETF ticks and the how to take advantage of all the myriad of advantages
- Learn how to perform effective due diligence using exposure, cost, liquidity, risk and structure
- Utilize ETFs for cash equitization, portfolio rebalancing, liquidity management, and more
- Learn how ETFs are expanding into equities, fixed income, emerging markets, and alternatives
- Learn how to avoid unwanted costs, liquidity issues and hidden complexities

ETF usage is climbing with assets growing by about 25 percent per year, and those who use them expect to expand their usage quickly. *The Institutional ETF Toolbox* provides the actionable information institutions need to identify and adopt the most suitable approach.

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### Editorial Review

#### Review

"This is THE book investors professional or otherwise should read to understand ETFs" - Ben Carlson (@awealthofcs) "This book has an impressive scope and offers good depth across many areas." - David Foulke (@alphaarchitect)

#### From the Inside Flap

It is widely known that exchange-traded funds (ETFs) have democratized investing by giving the little guy (retail) the same access as the big guy (institutions). While that is very true, the less-told story is that many institutions have also turned to ETFs for a wide variety of purposes. This detailed look at ETFs by Bloomberg's top ETF authority, Eric Balchunas, focuses on the fundamentals, best practices, and latest ETFs specifically useful to institutional investors. Professional-level guidance will help you understand, use, and perform due diligence on the diverse choice of ETFs available today. A range of examples, as well as valuable insight from leading practitioners, illustrate how some institutions went outside the norm to use ETFs in innovative and profitable ways. Cutting-edge coverage also includes new perspectives on liquidity and trading that reveal a wide range of possibilities for institutions.

The first section looks at why ETFs are so popular, where they came from, how they work, all the ways different institutions are using them, and what it takes to research and vet them. The second part gives you a categorical overview of the breadth of ETF choices available and enables you to dig down into the specifics of each one. You'll turn to this section again and again for its:

- In-depth look at various asset classes, including equities, fixed income, and alternatives
- Expanded coverage on such hot-topic areas as smart beta, currency hedging, and liquid alts
- Insider's perspective on trading ETFs, including how to consider premiums and discounts

Case studies in each section are carefully selected to provide an analytic edge when evaluating ETFs, making this reference endlessly useful in practice.

*The Institutional ETF Toolbox* is the institutional investor's guide to utilizing exchange-traded funds and taking full advantage of the innovative new products in their expanding repertoire. The ETF toolbox is expanding rapidly with nearly one new ETF launching every day this decade. As with any financial innovation, this phenomenon brings both opportunity and concerns, as well as a dire need for clarity and strong due diligence skills. In *The Institutional ETF Toolbox*, the professional money manager can take another look at ETFs, one of the most powerful and fastest-growing investing options available today.

#### From the Back Cover

### Praise for *The Institutional ETF Toolbox*

"Eric has done something most people would have thought impossible—he's made the world of ETFs and institutional investment management actually entertaining. Eric does more than just recite statistics and explain mechanics, he explores *why* ETFs have become the dominant financial tool of a generation. Whether you're a buy-side portfolio manager or a curious novice, you'll walk away from this book smarter than when you cracked the cover."

—**Dave Nadig**, Director of Exchange-Traded Funds, FactSet Research Systems

"Balchunas has provided 'The Missing Manual' for the ETF industry. If you invest with ETFs, you need this book!"

—**David Abner**, Head of Capital Markets, WisdomTree Asset Management

"Eureka! Eric has accomplished what no previous authors have accomplished—writing the ultimate ETF resource that is timely, informative, and useful for both amateurs and professionals. Read it."

—**Wesley Gray**, CIO, Alpha Architect

"The ETF market has grown from its simple beginning as a convenient way to trade a basket of stocks into a vast line-up of products that have multiple applications and uses. Eric's book is a vital resource for institutional investors seeking to solve portfolio problems and gain efficiency using these marvelous tools."

—**Rick Ferri**, Founder, Portfolio Solutions

## **Users Review**

### **From reader reviews:**

#### **Mark Hart:**

The book *The Institutional ETF Toolbox: How Institutions Can Understand and Utilize the Fast-Growing World of ETFs* (Bloomberg Financial) give you a sense of feeling enjoy for your spare time. You need to use to make your capable far more increase. Book can being your best friend when you getting stress or having big problem using your subject. If you can make looking at a book *The Institutional ETF Toolbox: How Institutions Can Understand and Utilize the Fast-Growing World of ETFs* (Bloomberg Financial) for being your habit, you can get a lot more advantages, like add your own capable, increase your knowledge about a number of or all subjects. It is possible to know everything if you like open and read a reserve *The Institutional ETF Toolbox: How Institutions Can Understand and Utilize the Fast-Growing World of ETFs* (Bloomberg Financial). Kinds of book are several. It means that, science book or encyclopedia or others. So , how do you think about this reserve?

#### **James Adcock:**

The guide untitled *The Institutional ETF Toolbox: How Institutions Can Understand and Utilize the Fast-Growing World of ETFs* (Bloomberg Financial) is the e-book that recommended to you you just read. You can see the quality of the guide content that will be shown to you actually. The language that publisher use to explained their way of doing something is easily to understand. The article writer was did a lot of investigation when write the book, and so the information that they share to your account is absolutely accurate. You also might get the e-book of *The Institutional ETF Toolbox: How Institutions Can Understand and Utilize the Fast-Growing World of ETFs* (Bloomberg Financial) from the publisher to make you a lot more enjoy free time.

#### **Lou Whisenhunt:**

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satisfy your short space of time to read it because this time you only find reserve that need more time to be study. The Institutional ETF Toolbox: How Institutions Can Understand and Utilize the Fast-Growing World of ETFs (Bloomberg Financial) can be your answer since it can be read by an individual who have those short extra time problems.

**Amy Rodriguez:**

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