



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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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:

Deanna Christianson:

Have you spare time for just a day? What do you do when you have considerably more or little spare time? Yes, you can choose the suitable activity regarding spend your time. Any person spent their particular spare time to take a stroll, shopping, or went to the particular Mall. How about open or even read a book eligible [The Institutional ETF Toolbox: How Institutions Can Understand and Utilize the Fast-Growing World of ETFs \(Bloomberg Financial\)](#)? Maybe it is to be best activity for you. You understand beside you can spend your time using your favorite's book, you can better than before. Do you agree with its opinion or you have different opinion?

Tanya Minor:

In this 21st millennium, people become competitive in each and every way. By being competitive currently, people have do something to make these individuals survives, being in the middle of the particular crowded place and notice by surrounding. One thing that occasionally many people have underestimated the idea for a while is reading. Yep, by reading a book your ability to survive raise then having chance to remain than other is high. For you who want to start reading a new book, we give you this [The Institutional ETF Toolbox: How Institutions Can Understand and Utilize the Fast-Growing World of ETFs \(Bloomberg Financial\)](#) book as beginner and daily reading reserve. Why, because this book is greater than just a book.

Lyla Jackson:

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reserve is well-known enough. This specific book also makes your own vocabulary increase well. Therefore it is easy to understand then can go along with you, both in printed or e-book style are available. We highly recommend you for having this specific The Institutional ETF Toolbox: How Institutions Can Understand and Utilize the Fast-Growing World of ETFs (Bloomberg Financial) instantly.

Karen Morris:

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