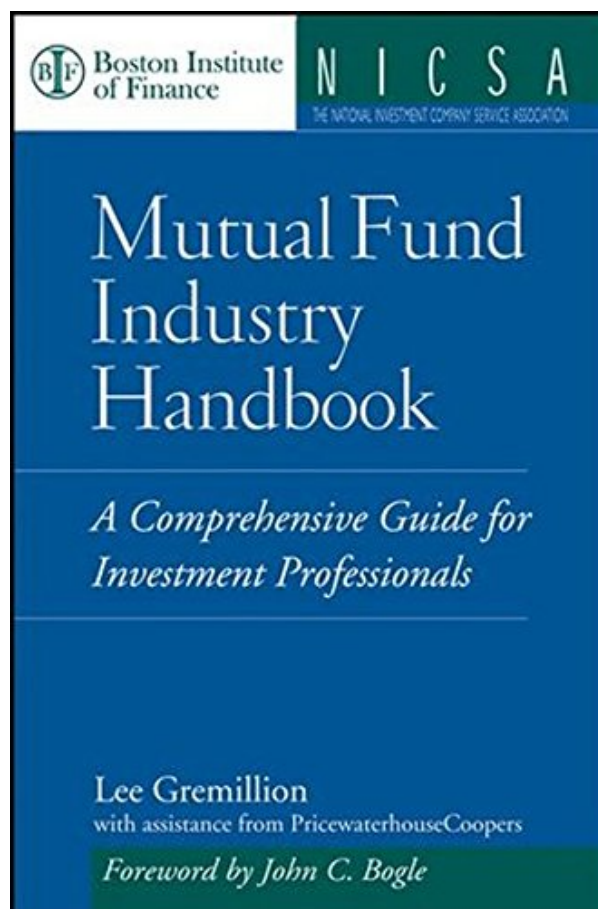


MUTUAL FUND INDUSTRY HANDBOOK : A COMPREHENSIVE GUIDE FOR INVESTMENT PROFESSIONALS BY LEE GREMILLION



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Boston Institute
of Finance

N I C S A

THE NATIONAL INVESTMENT COMPANY SERVICE ASSOCIATION

Mutual Fund Industry Handbook

*A Comprehensive Guide for
Investment Professionals*

Lee Gremillion

with assistance from PricewaterhouseCoopers

Foreword by John C. Bogle

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From the Inside Flap

A behind-the-scenes look at the mutual fund industry

With more than 8,000 funds, more than \$8 trillion in assets, and more than 87 million individual investors at the end of 2004, mutual funds—professionally managed pooled investment vehicles that give people the opportunity to participate in the securities market without having to become money managers—are very popular.

This book focuses on open end funds, and gives you a comprehensive inside look at the mutual fund industry, including real-life examples of how specific functions are performed at various firms. You'll explore industry history and structure, investment management, portfolio operations, accounting, auditing, legal compliance, customer service, distribution, globalization, and e-commerce. You'll also learn about the cost of various mutual fund operations—both to the fund companies and to investors.

Mutual Fund Industry Handbook does not provide information about how to select mutual funds or delve into specific funds or categories of funds. Rather, it describes every facet of mutual fund operations in an accessible and easy-to-understand manner. It also objectively addresses controversial topics, such as the fees that funds charge investors, disclosure requirements, advertising, active versus passive management, responsibilities of fund directors, and recent scandals, including illegal late trading and market timing. Mutual Fund Industry Handbook concludes with a discussion of trends and conditions that can impact the industry.

Whether you're an investment professional looking to improve your mutual fund knowledge or an investor who wants to understand what goes on behind the scenes throughout the mutual fund industry, this is the resource for you.

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