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KEY=STANDARD - JOCELYN MARKS

STANDARD FOR PORTFOLIO MANAGEMENT

Project Management Institute *The Standard for Portfolio Management – Fourth Edition has been updated to best reflect the current state of portfolio management. It describe the principles that drive accepted good portfolio management practices in today's organizations. It also expands the description of portfolio management to reflect its relation to organizational project management and the organization.*

THE STANDARD FOR PORTFOLIO MANAGEMENT

"Portfolio management is an integral part of the organization's overall strategic plan. The increasing acceptance of portfolio management indicates that the application of appropriate knowledge, processes, skills, tools, and techniques to select the right work may have a significant impact on program, project, and organization success. While project and program management continue to focus on "doing the work right," portfolio management maintains a concern with "doing the right work." The Standard for Portfolio Management -- Fourth Edition is an expansion of and companion to information provided in A Guide to the Project Management Body of Knowledge (PMBOK

THE STANDARD FOR PORTFOLIO MANAGEMENT

Project Management Inst *Presents an introduction to the processes of portfolio management, discussing how to identify business goals, develop strategy, evaluate environmental and risk factors and successfully complete project objectives. Original.*

PROJECT PORTFOLIO MANAGEMENT, SECOND EDITION

A MODEL FOR IMPROVED DECISION MAKING

Business Expert.Press *The focus of this book is aimed at providing a mechanism to determine the individual and cumulative contribution of portfolio components to strategic objectives so that the right decisions can be made regarding those components. Project portfolio management (PfM) is a critically important discipline, which organizations must embrace in order to extract the maximum value from their project investments. Essentially, PfM can be defined as the translation of strategy and organizational objectives into projects, programs, and operations (portfolio components); the allocation of resources to portfolio components according to organizational priorities; alignment of components to one or more organizational objectives and the management and control of these components in order to achieve organizational objectives and benefits. The interest and contribution to the body of knowledge in project portfolio management has been growing significantly in recent years, however, a particular area of concern is the decision-making, during the management of the portfolio, regarding which portfolio components to accelerate, suspend, or terminate. Failing to determine how the individual and cumulative components of a portfolio contribute to an organization's strategic objectives leads to poorly informed decisions that negate the positive effect that a sound understanding of project portfolio management could have in an organization.*

MASTERING PROJECT PORTFOLIO MANAGEMENT

A SYSTEMS APPROACH TO ACHIEVING STRATEGIC OBJECTIVES

J. Ross Publishing *This unique text provides a holistic systems approach to project portfolio management which includes people, processes, tools, and techniques that work synergistically to produce portfolio decisions with the best chance of success. Accompanied by decision support software and advanced decision making techniques, it guides readers step-by-step through the entire project portfolio management process. This professional guide is also ideal for executive continuing education programs, and as a primary text for graduate level academic courses.*

PROJECT PORTFOLIO MANAGEMENT

A VIEW FROM THE MANAGEMENT TRENCHES

John Wiley & Sons *This book is written by ten members of the Enterprise Portfolio Management Council who come from a range of businesses and industries. The authors write from their perspectives "from the trenches" and talk to their peers about how each step of the portfolio management process works. The book begins with the basics of what portfolio management is and why its critical to the success of a business. From there the book walks through each part of the process using cases and examples from the authors' own experience to illustrate successful and unsuccessful processes.*

PORTFOLIO MANAGEMENT

A STRATEGIC APPROACH

CRC Press *Recognizing the importance of selecting and pursuing programs, projects, and operational work that add sustainable business value that benefits end users, the Project Management Institute (PMI®) issued its first Standard on Portfolio Management in 2006. In 2014, it launched the Portfolio Management Professional (PfMP®) credential—which several of the experts who contributed to this book earned—to recognize the advanced expertise required of practitioners in the field. Presenting information that is current with The Standard for Portfolio Management, Third Edition (2013); Portfolio Management: A Strategic Approach supplies in-depth treatment of the five domains and identifies best practices to ensure the organization has a balanced portfolio management that is critical to success. Following PMI's standard, the book is organized according to its five domains: strategic alignment, governance, portfolio performance management, portfolio risk management, and portfolio communications management. Each chapter presents the insight of different thought leaders in academia and business. Contributors from around the world, including the Americas, Europe, the Middle East, Africa, and Australia, supply a global perspective as to why portfolio management is essential for all types of organizations. They provide guidelines, examples, and models to consider, along with discussion and analysis of relevant literature in the field. Most chapters reference PMI standards, complement their concepts, and expand on the concepts and issues that the standards mention in passing or not at all. Overall, this is a must-have resource for anyone pursuing the PfMP® credential from PMI. For executives and practitioners in the field, it provides the concepts you will need to address the ever-changing complexities that impact your work. This book is also suitable as a textbook for universities offering courses on portfolio management.*

THE STANDARD FOR RISK MANAGEMENT IN PORTFOLIOS, PROGRAMS, AND PROJECTS

Project Management Institute *This is an update and expansion upon PMI's popular reference, The Practice Standard for Project Risk Management. Risk Management addresses the fact that certain events or conditions may occur with impacts on project, program, and portfolio objectives. This standard will: identify the core principles for risk management; describe the fundamentals of risk management and the environment within which it is carried out; define the risk management life cycle; and apply risk management principles to the portfolio, program, and project domains within the context of an enterprise risk management approach It is primarily written for portfolio, program, and project managers, but is a useful tool for leaders and business consumers of risk management, and other stakeholders.*

OPTIMIZING CORPORATE PORTFOLIO MANAGEMENT

ALIGNING INVESTMENT PROPOSALS WITH ORGANIZATIONAL STRATEGY

John Wiley & Sons If where an organization allocates its resources determines its strategy, why is it that so few companies actively manage the resource allocation process? "Optimizing Corporate Portfolio Management: Aligning Investment Proposals with Organizational Strategy" goes beyond platitudes about why you should use corporate portfolio management (CPM) by offering a practical methodology to bring this powerful discipline to your organization. "Optimizing Corporate Portfolio Management" takes an expansive view of where CPM can be utilized by demonstrating that it can be used across any business line, product group or functional area, e.g., IT, R&D, innovation, marketing, salesforce, capital expenditure, etc. CPM is appropriate anywhere discretionary investments are being selected and executed. As a result, other terms used to describe portfolio management such as IT portfolio management, enterprise portfolio management, and project portfolio management are all merely subsets or slices of CPM. The book is written by Anand Sanwal, an expert on CPM, who has led American Express' CPM discipline (referred to as American Express Investment Optimization). American Express' CPM efforts are widely recognized as the most extensive, substantial and progressive deployment of CPM across any organization. Sanwal avoids academic theories and consultant jargon to ultimately deliver pragmatic and proven recommendations on how to make CPM a reality. The book features a foreword by Gary Crittenden, former CFO and EVP of American Express, and several case studies from leading financial services, technology, and government organizations utilizing CPM. Additionally, the book has received significant praise from thought leaders at Google, HP, American Express, The CFO Executive Board, Gartner, Accenture Marketing Sciences, The Wharton School of Business and many others.

PASSING THE PFMP(R) EXAM

A STUDY GUIDE

"Passing the PfMP Exam: A Study Guide" was developed to help you pass the Portfolio Management Professional Certification PfMP(r) exam on your first attempt. This book is created based on the "The Standard for Portfolio Management - Third Edition" which was PMI certified in 2013. Throughout this book, it will be referred to as the Standard Guide. This book adopts all PMI publications related to the Portfolio Management that were created before the publication date of this edition. This book is complementary to the Standard Guide; it describes many tips, helps you to remember many important standards, and provides you with a sense of the exam. By presenting a strong and proven study plan that aids with the remembering and understanding of the core concepts, and by providing the examinees with exam tips and tricks that help them grow a sense of what the exam is testing for, Passing the PfMP(r) Exam: A Study Guide paves the road for candidates to succeed in their examinations. This book has unique figures to visualize the portfolio management knowledge areas and their relation with the portfolio management process groups. Another unique feature of the book is that it creates cross references to the common input/output, key deliverables, and common tools and techniques across the sixteen Portfolio management processes. Furthermore, there are many tips and two full exam question sets; 170 questions each, with enough explanation to understand the right answer. This technique makes you more ready for the exam and more acquainted with the expected tricks. This book is different from others as it was created by the author who passed the PfMP(r) exam after the pilot period was finished and the exam became mature enough to continue with the same skeleton. Therefore, it reflects the flavor of the questions that you are going to see on the exam today. Besides, it covers different examples of each type of the commonly found questions on the current PfMP(r) exam model; including the regular question, table question, and question set. As a portfolio manager, your practical experience will help you a lot to pass the exam, and it is a critical success factor of your readiness to the exam. However, in this book, you will find a major support to orient you to the examination philosophy that you will face. PMP, PgMP, and PfMP are registered trademarks by PMI. This book is not related to PMI or licensed by PMI. The Second Edition offers major enhancements on the content and restructures the book to further increase the candidate's readiness for the exam. The title of The Second Edition changed from "Passing the PfMP(r) Exam the First Time" to "Passing the PfMP(r) Exam: A Study Guide". The book gives you an opportunity to test yourself by having the exam questions listed all together, so, you can pass through them as if you are in the exam. On the other hand, it gives the opportunity to review the exam results or study by having the question followed by its answer for the full exam in another separate section. If you need to test yourself or study a particular Domain, you can still get the same questions listed in Exam (1) and Exam (2), ordered by Domain name in Appendix (A). This book consists of three parts: * Part 1: Study Tips and Exam Solving Techniques * Part 2: Exam 1 (170 Question) * Part 3: Exam 2 (170 Question) Please note that each question answer has the following: * The Right Answer * Standard Guide Reference: this is referring to "The Standard for Portfolio Management - Third Edition" which is a PMI certified book. * Clarification and Tips: this is the most important part of the answer as it describes the reasons for selecting the right answer and eliminating the other three choices. * Knowledge Area * Process Group

ACTIVE PORTFOLIO MANAGEMENT: A QUANTITATIVE APPROACH FOR PRODUCING SUPERIOR RETURNS AND SELECTING SUPERIOR RETURNS AND CONTROLLING RISK

McGraw Hill Professional "This new edition of Active Portfolio Management continues the standard of excellence established in the first edition, with new and clear insights to help investment professionals." -William E. Jacques, Partner and Chief Investment Officer, Martingale Asset Management. "Active Portfolio Management offers investors an opportunity to better understand the balance between manager skill and portfolio risk. Both fundamental and quantitative investment managers will benefit from studying this updated edition by Grinold and Kahn." -Scott Stewart, Portfolio Manager, Fidelity Select Equity ® Discipline Co-Manager, Fidelity Freedom ® Funds. "This Second edition will not remain on the shelf, but will be continually referenced by both novice and expert. There is a substantial expansion in both depth and breadth on the original. It clearly and concisely explains all aspects of the foundations and the latest thinking in active portfolio management." -Eric N. Remole, Managing Director, Head of Global Structured Equity, Credit Suisse Asset Management. Mathematically rigorous and meticulously organized, Active Portfolio Management broke new ground when it first became available to investment managers in 1994. By outlining an innovative process to uncover raw signals of asset returns, develop them into refined forecasts, then use those forecasts to construct portfolios of exceptional return and minimal risk, i.e., portfolios that consistently beat the market, this hallmark book helped thousands of investment managers. Active Portfolio Management, Second Edition, now sets the bar even higher. Like its predecessor, this volume details how to apply economics, econometrics, and operations research to solving practical investment problems, and uncovering superior profit opportunities. It outlines an active management framework that begins with a benchmark portfolio, then defines exceptional returns as they relate to that benchmark. Beyond the comprehensive treatment of the active management process covered previously, this new edition expands to cover asset allocation, long/short investing, information horizons, and other topics relevant today. It revisits a number of discussions from the first edition, shedding new light on some of today's most pressing issues, including risk, dispersion, market impact, and performance analysis, while providing empirical evidence where appropriate. The result is an updated, comprehensive set of strategic concepts and rules of thumb for guiding the process of-and increasing the profits from-active investment management.

THE STANDARD FOR PROGRAM MANAGEMENT - FOURTH EDITION (HINDI)

The Standard for Program Management - Fourth Edition differs from prior editions by focusing on the principles of good program management. Program activities have been realigned to program lifecycle phases rather than topics, and the first section was expanded to address the key roles of program manager, program sponsor and program management office. It has also been updated to better align with PMI's Governance of Portfolios, Programs, and Projects: A Practice Guide.

STRATEGIC PROJECT PORTFOLIO MANAGEMENT

ENABLING A PRODUCTIVE ORGANIZATION

John Wiley & Sons Lead change through strategic alignment of project and process performance Practical and filled with expert advice, Strategic Project Portfolio Management: Enabling a Productive Organization presents a clear framework for your organization to complete impactful strategic projects. Providing executive-level guidance to build a powerful and efficient process from initial adoption to portfolio alignment, this essential resource contains case studies from small to global multinational organizations, arming you with the insights to ensure your strategic projects are given the resources they need to deliver business impact. This important guide Shows executives how to align their projects and processes with their business strategy for compelling competitive advantage Provides cases from best in class organizations, showing how they were able to achieve results by using processes outlined in the book Reveals how technology is the key to developing new collaborative platforms and innovative work management environments that have not been possible until now Defines a framework for assessing project portfolio management competence within your organization and driving momentum for compelling improvements Explores how to go beyond project portfolio management to a holistic work management system Strategic Project Portfolio Management: Enabling a Productive Organization offers the practical recommendations, guidance, and real world insights you need to immediately begin driving better project management strategy.

QUANTITATIVE EQUITY PORTFOLIO MANAGEMENT

MODERN TECHNIQUES AND APPLICATIONS

CRC Press Quantitative equity portfolio management combines theories and advanced techniques from several disciplines, including financial economics, accounting, mathematics, and operational research. While many texts are devoted to these disciplines, few deal with quantitative equity investing in

a systematic and mathematical framework that is suitable for quantitative investment students. Providing a solid foundation in the subject, *Quantitative Equity Portfolio Management: Modern Techniques and Applications* presents a self-contained overview and a detailed mathematical treatment of various topics. From the theoretical basis of behavior finance to recently developed techniques, the authors review quantitative investment strategies and factors that are commonly used in practice, including value, momentum, and quality, accompanied by their academic origins. They present advanced techniques and applications in return forecasting models, risk management, portfolio construction, and portfolio implementation that include examples such as optimal multi-factor models, contextual and nonlinear models, factor timing techniques, portfolio turnover control, Monte Carlo valuation of firm values, and optimal trading. In many cases, the text frames related problems in mathematical terms and illustrates the mathematical concepts and solutions with numerical and empirical examples. Ideal for students in computational and quantitative finance programs, *Quantitative Equity Portfolio Management* serves as a guide to combat many common modeling issues and provides a rich understanding of portfolio management using mathematical analysis.

QUANTITATIVE EQUITY PORTFOLIO MANAGEMENT, 2ND EDITION

McGraw-Hill Education The classic guide that taught a generation of institutional investors how to construct and manage high-yield quant portfolios—now updated for the new generation *Quantitative Equity Portfolio Management* is a comprehensive guide to the entire process of constructing and managing a high-yield quantitative equity portfolio. This detailed handbook begins with the basic principles of quantitative active management and then clearly outlines how to build an equity portfolio using those powerful concepts. This edition of the go-to guide for quant investing has been updated with critical new data, information, and insights, including: All table and graph data updated to 2020 The secret ingredients to building smart beta ETFs and mutual funds A new list of behavioral biases that lead to investment anomalies Entirely new factor definitions and test of their outperformance with real stock return data New labs using real data written in R, MATLAB, and STATA with new techniques to optimize professional portfolios New methods to deal with outlier data The author's new research on transaction cost problems Detailed uses of ESG data to create socially responsible portfolios Downloadable monthly factor returns from the authors *Quantitative Equity Portfolio Management* delivers a complete, easy-to-apply methodology for creating an equity portfolio that maximizes returns and minimizes risks. It covers every step of the process, including basic models, stock screening and ranking, fundamental and economic factor modelling, forecasting factor premiums and exposures, building market neutral portfolios, tax management, performance measurement and attribution, and backtesting. An essential reference for professional money managers and students taking advanced investment courses, *Quantitative Equity Portfolio Management* offers a full array of methods for effectively developing high-performance equity portfolios that deliver lucrative returns for clients.

PIONEERING PORTFOLIO MANAGEMENT

AN UNCONVENTIONAL APPROACH TO INSTITUTIONAL INVESTMENT, FULLY REVISED AND UPDATED

Simon and Schuster In the years since the now-classic *Pioneering Portfolio Management* was first published, the global investment landscape has changed dramatically -- but the results of David Swensen's investment strategy for the Yale University endowment have remained as impressive as ever. Year after year, Yale's portfolio has trumped the marketplace by a wide margin, and, with over \$20 billion added to the endowment under his twenty-three-year tenure, Swensen has contributed more to Yale's finances than anyone ever has to any university in the country. What may have seemed like one among many success stories in the era before the Internet bubble burst emerges now as a completely unprecedented institutional investment achievement. In this fully revised and updated edition, Swensen, author of the bestselling personal finance guide *Unconventional Success*, describes the investment process that underpins Yale's endowment. He provides lucid and penetrating insight into the world of institutional funds management, illuminating topics ranging from asset-allocation structures to active fund management. Swensen employs an array of vivid real-world examples, many drawn from his own formidable experience, to address critical concepts such as handling risk, selecting advisors, and weathering market pitfalls. Swensen offers clear and incisive advice, especially when describing a counterintuitive path. Conventional investing too often leads to buying high and selling low. Trust is more important than flash-in-the-pan success. Expertise, fortitude, and the long view produce positive results where gimmicks and trend following do not. The original *Pioneering Portfolio Management* outlined a commonsense template for structuring a well-diversified equity-oriented portfolio. This new edition provides fund managers and students of the market an up-to-date guide for actively managed investment portfolios.

PROGRAM MANAGEMENT

A LIFE CYCLE APPROACH

CRC Press Program management is a rapidly emerging offshoot of project management. So much so that AT&T, IBM, and other organizations, both large and small in all sectors, have initiated a push to certify program managers. And, although universities offer courses in program management, there are few books available to guide program managers through this field that requires a broad level of knowledge and experience. The definitive reference on program management, *Program Management: A Life Cycle Approach* provides this much needed guidance. Edited by Dr. Ginger Levin, the second person to become a PMI® certified program manager (PgMP®), this handbook presents a cohesive compilation of program management knowledge from more than 20 certified PgMPs. It considers the entire program life cycle and its phases—from initiation to sustainability. Each chapter is written by an experienced PgMP from a wide range of industries and countries. Combining the rigor of an academic reference with easy-to-read language, the book covers the themes in the PMI Standard for Program Management and ties them to program managers' work. The chapters reference PMI's standards, complement the concepts in the standards, and expand on the concepts and issues that the standard mentions in passing. The book also addresses a few issues that the standard does not touch on at all. The book can be read in its entirety, or specific chapters of interest can be read separately. Overall, the book provides practitioners with a reliable source of information on the key themes and issues in program management. It is useful for individuals desiring to attain the PgMP credential and suitable for colleges and universities offering courses in program management.

STUDENT-MANAGED INVESTMENT FUNDS

ORGANIZATION, POLICY, AND PORTFOLIO MANAGEMENT

Academic Press *Student-Managed Investment Funds: Organization, Policy, and Portfolio Management, Second Edition*, helps students work within a structured investment management organization, whatever that organizational structure might be. It aids them in developing an appreciation for day-to-day fund operations (e.g., how to get portfolio trade ideas approved, how to execute trades, how to reconcile investment performance), and it addresses the management of the portfolio and the valuation/selection process for discriminating between securities. No other book covers the "operational" related issues in SMIFs, like organizations, tools, data, presentation, and performance evaluation. With examples of investment policy statements, presentation slides, and organizational structures from other schools, *Student-Managed Investment Funds* can be used globally by students, instructors, and administrators alike. Addresses the basics of valuation as well as issues related to maintaining compliance, philosophy, performance measurement, and evaluation Provides explanations and examples about organizing a student-managed fund Reviews fundamental stock valuation approaches like multi-stage DDM, FCF, and price multiples

IMPLEMENTING PROGRAM MANAGEMENT

TEMPLATES AND FORMS ALIGNED WITH THE STANDARD FOR PROGRAM MANAGEMENT - SECOND EDITION (2008)

CRC Press In early 2007, the Project Management Institute (PMI) piloted the now highly sought after Program Management Professional (PgMP) credential, reflecting the growing trend for organizations to coordinate the work done on numerous stand-alone projects into a cohesive program-type structure. Written by two successful PgMPs, *Implementing Program Management*

ADVANCED PROJECT PORTFOLIO MANAGEMENT AND THE PMO

MULTIPLYING ROI AT WARP SPEED

J. Ross Publishing *Advanced Project Portfolio Management* is a comprehensive book which presents a roadmap for the achievement of high value enterprise strategies and superior project management results. It provides methods for best project selection, faster completion, optimal project portfolio management, and how to explicitly measure the PMO for rapidly increasing project ROI.

LEADING AND MANAGING INNOVATION

WHAT EVERY EXECUTIVE TEAM MUST KNOW ABOUT PROJECT, PROGRAM, AND PORTFOLIO MANAGEMENT, SECOND EDITION

CRC Press *The primary cause of many project failures is that responsible executives, because of their lack of knowledge in project management, fail to demand that their managers and staff properly utilize the well-proven best practices, processes, systems, and tools that are now available in this field. This book remedies this situation by providing executives at all levels with the understanding and knowledge needed to best take advantage of the power of effective project management and thereby lead and manage innovations within their enterprise. In *Leading and Managing Innovation: What Every Executive Team Must Know about Project, Program, and Portfolio Management, Second Edition*, the authors present concise descriptions of The key concepts underlying project and program management The important characteristics of projects and programs How projects and programs are best governed and managed How to determine if the desired benefits have actually been achieved The book presents a list of 31 reasonable demands that executives can and must place on their staff members to ensure excellence in the way their programs and projects are created, selected for funding, planned, and executed. Placing these demands communicates to the entire enterprise that top management understands what it takes to achieve the best performance possible and fully supports the continuous improvement needed to ensure continued success. *Leading and Managing Innovation* explains how to measure the project management maturity level of an enterprise, benchmark against competitors, and identify where project management improvements are required. It discusses the many ways that an enterprise can derive substantial success and competitive advantage from increasing its project management maturity level. A helpful quick reference summary of all of the book's key information is included in the final chapter. Armed with this information, you will be well-qualified to give excellent direction to your managers and staff to ensure that your vital capability in the field of project management—and how you manage innovation—is equal to or better than that of your competitors.*

PROJECT MANAGER COMPETENCY DEVELOPMENT FRAMEWORK - THIRD EDITION

Project Management Institute *Building on the framework developed in the previous edition, *Project Manager Competency Development Framework - Third Edition* extends the framework both vertically (to include program and portfolio managers) and horizontally (to cover continued development for the roles of project/program/portfolio managers). The *Project Manager Competency Development (PMCD) Framework - Third Edition*: •Aligns with the PMP® Examination Specification •Aligns with the PMBOK® Guide - Fifth Edition •Aligns with The Standard for Program Management - Third Edition •Aligns with The Standard for Portfolio Management - Third Edition •Builds upon the framework from the second edition (knowledge, performance, and personal competencies), in particular the personal competencies •Provides examples of evidence required to demonstrate competence •Recognizes and addresses the need for career development along a continuum of expertise and experience The PMCD Framework is designed so all participants in the project management process are able to assess their current level of project/program/portfolio management competence.*

STRATEGIC PORTFOLIO MANAGEMENT

THE KEY TO THE EXECUTIVE SUITE

To manage a portfolio of projects successfully, a project manager must obtain and exploit the support of senior management. Only with executive support can project managers achieve the results that enable the organization to implement its strategy through its projects. This paper examines and compares two case studies in practicing strategic portfolio management (SPM), one effort that succeeded (Boeing 787) and one effort that failed (EADS Airbus A380). In doing so, it defines the two types of portfolio management--tactical and strategic--and the impact of implementing, and failing to implement, SPM; it describes the primary executive activities involved in developing strategies and managing portfolios. It explains the changes that will appear in the second edition of PMI's Standard for portfolio management; it identifies a calculation for determining how well an organization is implementing its strategies through projects. It also looks at the four components shaping a project portfolio. It then examines the portfolio management best practices which Boeing used and which Airbus did not while designing and constructing their high-profile aircraft projects. It discusses each company's portfolio objectives, performance, and project factors in relation to customer service, collaboration, knowledge-sharing, marketing, and product performance.

QUANTITATIVE EQUITY PORTFOLIO MANAGEMENT

AN ACTIVE APPROACH TO PORTFOLIO CONSTRUCTION AND MANAGEMENT

McGraw Hill Professional *Quantitative Equity Portfolio Management brings the orderly structure of fundamental asset management to the often-chaotic world of active equity management. Straightforward and accessible, it provides you with nuts-and-bolts details for selecting and aggregating factors, building a risk model, and much more.*

PROJECT PORTFOLIO MANAGEMENT IN THEORY AND PRACTICE

THIRTY CASE STUDIES FROM AROUND THE WORLD

CRC Press *Every CEO in the world, if questioned, will always complain that there are a lot of ideas to implement, but, unfortunately, insufficient resources to accomplish them. This book provides a solution to this dilemma by supplying techniques to assess the value of projects, prioritize projects, and decide which projects to implement and which to postpone. In addition, it describes various methods of balancing project portfolios and different strategic alignment models. The book provides thirty real-life project portfolio management case studies from pharmaceutical, product development, financial, energy, telecommunications, not-for-profit and professional services industries.*

GOVERNANCE OF PORTFOLIOS, PROGRAMS, AND PROJECTS

A PRACTICE GUIDE

Project Management Institute *Understanding governance as it applies to portfolios, programs, and projects is growing in importance to organizations, because appropriate governance is a factor in the success or failure of strategic initiatives and portfolios, as well as an organization's programs and projects. Implementing an effective governance framework can be challenging due to factors such as increasing business complexities, regulatory requirements, globalization, and rapid changes in technology and business environments. Many organizations do not have a consistent approach to portfolio, program, and project governance. PMI's *Governance of Portfolios, Programs, and Projects: A Practice Guide*, developed by leading experts in the field, provides guidance to organizations and practitioners on how to implement or enhance governance on portfolios, programs, and projects. This practice guide provides definitions for governance in an effort to distinguish the different levels of governance and to identify their common elements.*

PROJECT MANAGEMENT FUNDAMENTALS

KEY CONCEPTS AND METHODOLOGY

Berrett-Koehler Publishers *Build on the Right Fundamentals for Project Management Success! To achieve success in any endeavor, you need to understand the fundamental aspects of that endeavor. To achieve success in project management, you should start with *Project Management Fundamentals: Key Concepts and Methodology, Second Edition*. This completely revised edition offers new project managers a solid foundation in the basics of the discipline. Using a step-by-step approach and conventional project management (PM) terminology, *Project Management Fundamentals* is a commonsense guide that focuses on how essential PM methods, tools, and techniques can be put into practice immediately. New material in this second edition includes: • A thorough discussion of agile project management and its use in real-life situations • Detailed explanations of the unique factors involved in managing service projects • An enhanced appendix on management maturity models • A new appendix on project communications and social networking • Expanded coverage of the triple constraints in PM, going beyond scope, schedule, and cost to include quality, resources, and risks As a refresher for the experienced project manager or as a comprehensive introductory guide for the new practitioner, *Project Management Fundamentals: Key Concepts and Methodology, Second Edition*, is the go-to resource that delivers.*

PROGRAM MANAGEMENT

Ashgate Publishing, Ltd. Program management (PgM) is fast developing as the essential link between strategy and projects and as a vehicle for organizational change. It offers the means to manage groups of projects with a common business purpose in an integrated and effective way. The Second Edition of Michel Thiry's Program Management builds on the bestselling title first published in 2010. The heavily revised text reflects the latest program management guides and international standards and includes: a new section on agile management in programs; the author's own program management maturity measure; a new section on change management, which is now integral to many programs. Michel has also reviewed and revised the program lifecycle to align with the more unified view of program management that has emerged since the book was first published. The result is an essential guide to program management that incorporates a robust theoretical framework, complemented by examples and advice from one of the world's leading practitioners. .

PORTFOLIO MANAGEMENT FOR NEW PRODUCTS

Addison Wesley Publishing Company A powerful new approach to maximizing the value of your company's product development projects.

THE THEORY AND PRACTICE OF INVESTMENT MANAGEMENT

ASSET ALLOCATION, VALUATION, PORTFOLIO CONSTRUCTION, AND STRATEGIES

John Wiley & Sons An updated guide to the theory and practice of investment management Many books focus on the theory of investment management and leave the details of the implementation of the theory up to you. This book illustrates how theory is applied in practice while stressing the importance of the portfolio construction process. The Second Edition of The Theory and Practice of Investment Management is the ultimate guide to understanding the various aspects of investment management and investment vehicles. Tying together theoretical advances in investment management with actual practical applications, this book gives you a unique opportunity to use proven investment management techniques to protect and grow a portfolio under many different circumstances. Contains new material on the latest tools and strategies for both equity and fixed income portfolio management Includes key take-aways as well as study questions at the conclusion of each chapter A timely updated guide to an important topic in today's investment world This comprehensive investment management resource combines real-world financial knowledge with investment management theory to provide you with the practical guidance needed to succeed within the investment management arena.

SECURITY ANALYSIS AND PORTFOLIO MANAGEMENT, 2ND EDITION

Vikas Publishing House In the current scenario, investing in the stock markets poses a significant challenge even for seasoned professionals. Not surprisingly, many students find the subject Security Analysis and Portfolio Management difficult. This book offers conceptual clarity and in-depth coverage with a student-friendly approach. Targeted at the postgraduate students of management and commerce, it is an attempt to demystify the difficult subject. The book is divided into three parts. Part I explains the Indian stock market; Part II exclusively deals with the different aspects of security analysis; Part III is devoted to portfolio analysis.

HOW SUCCESSFUL ORGANIZATIONS IMPLEMENT CHANGE

INTEGRATING ORGANIZATIONAL CHANGE MANAGEMENT AND PROJECT MANAGEMENT TO DELIVER STRATEGIC VALUE

Project Management Institute The only constant is change—especially in today's business environment. Increasing globalization and the rise of new markets and technologies are forcing companies to compete in a more turbulent world than ever. To survive and thrive, organizations must be able to continuously evolve. Unfortunately, people tend to resist change. Uncertainty can be daunting, and people generally prefer to keep doing what they already know, avoiding unfamiliar situations, particularly in their work. The good news is that change can be managed using the same processes many organizations already use in their day-to-day project management activities. After all, every project results in some type of change to an organization. Building on the Project Management Institute's Managing Change in Organizations: A Practice Guide, and drawing on the project management expertise of a wide variety of authors, How Successful Organizations Implement Change explains the critical aspects of the change management process and outlines the methods that project, program, and portfolio managers can utilize to bring effective change in a complex and transient business context. For practitioners who are directly leading the change effort as well as those affected by it; for executives formulating strategies, even those managing operations; and for academics researching or teaching others about organizational change management, the examples provided in this book cover a broad range of industries and areas of business. How Successful Organizations Implement Change combines the change management knowledge of experts, academics, researchers, and practitioners with tools, processes, and templates, all of which make this volume a valuable resource, a must-have, for leaders of change in organizations.

ORGANIZATIONAL PROJECT MANAGEMENT MATURITY MODEL (OPM3)

KNOWLEDGE FOUNDATION

Project Management Inst A second edition provides tools for organizations to measure their maturity against a comprehensive set of best practices, providing updated coverage of current PMI standards, guidelines for promoting smoother transitions and strategies for eliminating redundancy.

PORTFOLIO MANAGEMENT

A STRATEGIC APPROACH

CRC Press Recognizing the importance of selecting and pursuing programs, projects, and operational work that add sustainable business value that benefits end users, the Project Management Institute (PMI) issued its first Standard on Portfolio Management in 2006. In 2014, it launched the Portfolio Management Professional (PfMP) credential-which several of the

PROGRAM MANAGEMENT

A LIFE CYCLE APPROACH

CRC Press Program management is a rapidly emerging offshoot of project management. So much so that AT&T, IBM, and other organizations, both large and small in all sectors, have initiated a push to certify program managers. And, although universities offer courses in program management, there are few books available to guide program managers through this

THE FOUR PILLARS OF PORTFOLIO MANAGEMENT

ORGANIZATIONAL AGILITY, STRATEGY, RISK, AND RESOURCES

CRC Press Portfolio management consists mainly of making decisions about which initiatives to undertake, which initiatives not to pursue, and which resources are to be allocated to which portfolio component. At least, that's how it is most commonly presented in textbooks and courses. Indeed, it is all of that, but it is also so much more. Portfolio management is, of course, about making these decisions, but, more accurately, it is about making them with the goal of creating value for an organization's wide population of stakeholders, both internal and external. This value is not only expressed in financial terms but also in social terms. The portfolio should create value for all stakeholders, who thereby support the portfolio organization and enable it to sustain itself. Portfolio management is about the realization of strategic vision, achieving a purpose, and developing an intelligent way of using

resources to benefit stakeholders. This requires the ability to find a balance among the different dimensions of portfolio governance and among the constraints constantly shaping and reshaping the business environment. This is what portfolio management is truly about; this is what organizational management is about. *The Four Pillars of Portfolio Management: Organizational Agility, Strategy, Risk, and Resources* takes readers on a journey navigating the dimensions and constraints to be balanced and integrated as part of the portfolio and organizational decision-making process. By balancing the requirements of strategic alignment with the exposure to risk and by reconciling resource demands with capability, a portfolio manager can develop and sustain an organization despite the constant and dynamic evolution of the business environment. This book explains how to manage portfolios that create the agility all organizations require to survive and thrive.

BEHAVIORAL FINANCE: THE SECOND GENERATION

CFA Institute Research Foundation Behavioral finance presented in this book is the second-generation of behavioral finance. The first generation, starting in the early 1980s, largely accepted standard finance's notion of people's wants as "rational" wants—restricted to the utilitarian benefits of high returns and low risk. That first generation commonly described people as "irrational"—succumbing to cognitive and emotional errors and misled on their way to their rational wants. The second generation describes people as normal. It begins by acknowledging the full range of people's normal wants and their benefits—utilitarian, expressive, and emotional—distinguishes normal wants from errors, and offers guidance on using shortcuts and avoiding errors on the way to satisfying normal wants. People's normal wants include financial security, nurturing children and families, gaining high social status, and staying true to values. People's normal wants, even more than their cognitive and emotional shortcuts and errors, underlie answers to important questions of finance, including saving and spending, portfolio construction, asset pricing, and market efficiency.

PRACTICE STANDARD FOR PROJECT RISK MANAGEMENT

Project Management Institute The Practice Standard for Project Risk Management covers risk management as it is applied to single projects only. It does not cover risk in programs or portfolios. This practice standard is consistent with the PMBOK® Guide and is aligned with other PMI practice standards. Different projects, organizations and situations require a variety of approaches to risk management and there are several specific ways to conduct risk management that are in agreement with principles of Project Risk Management as presented in this practice standard.

COMPLYING WITH THE GLOBAL INVESTMENT PERFORMANCE STANDARDS (GIPS)

John Wiley & Sons The first and only comprehensive explanation of GIPS, including how to comply with and implement them While the CFA Institute has published Global Investment Performance Standards (GIPS) for years, there has never been a serious discussion of their implementation and best use. In this new book, that void is filled, and you'll quickly discover how to calculate, present, and interpret investment performance conforming to standards that are currently used in over thirty countries worldwide. Covering both the mathematics of relevant investment statistics and the policies and procedures for achieving and maintaining compliance, this book is a comprehensive guide to successfully using GIPS standards in today's turbulent investment environment. Chapters include information on GIPS fundamentals, performance composites, risk and dispersion measurement, and much more. Examples are provided throughout, and supplemental formulas make the book usable as a reference. Provides the detailed knowledge currently needed by a large group of investment professionals. If you're in the field of finance, *Complying with the Global Investment Performance Standards (GIPS)* is a book you need to read.

ASSET MANAGEMENT STANDARDS

CORPORATE GOVERNANCE FOR ASSET MANAGEMENT

Springer Asset management standards are crucial for building trust between investors and capital market experts. The issue of corporate governance has been thrown into the spotlight by the disastrous collapse of Enron and the implications for the industry. The proposed standards are relevant for the entire fund industry, regulators, providers of pension plans and portfolio managers. Produced in association with the European Federation of Financial Analysts Societies, this book aims to provide a well-founded basis for development of the content of asset management standards in the UK, the US and the EU. It contains a detailed overview of the current position, outlines planned developments and discusses underlying problems.