



## Best Practices for Equity Research Analysts: Essentials for Buy-Side and Sell-Side Analysts (Professional Finance & Investment)

By James J. Valentine

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**A real-world guide to becoming a top-performing equity analyst**

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*"Jim Valentine has taken his decades of experience as a highly successful security analyst and written an effective and comprehensive guide to doing the job right. I only wish I had this book by my side throughout my career."* -- Byron R. Wien, Vice Chairman, Blackstone Advisory Partners LP

*"Given the fast pace and high-pressure nature of the markets, analysts don't have the luxury to make mistakes. James J. Valentine's Best Practices for Equity Research Analysts should be required reading for all new and experienced analysts, particularly those who were not lucky enough to be brought up in the business under a mentor. Valentine can be that mentor."* -- Jami Rubin, Managing Director, Global Investment Research, Goldman Sachs

*"Jim's book is an excellent window into the world of securities research. Very few works cover the complete life cycle of an analyst and the necessary balance between theory and practice. This is one of them."* -- Juan-Luis Perez, Global Director of Research, Morgan Stanley

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*"Best Practices for Equity Research Analysts is by far the best written and most comprehensive book that I have read on how to become a top-notch analyst. I shouldn't be surprised; it was written by one of the best analysts that Wall Street has ever seen. Every securities firm should require their analysts to read this*

*book.*" -- Eli Salzman, Portfolio Manager

Most equity research analysts learn their trade on the job by apprenticing under a senior analyst. However, equity analysts who work for senior producers often have little time or incentive to train new hires, and those who do have the time may not have research skills worth emulating.

Now, *Best Practices for Equity Research Analysts* offers promising equity research analysts a practical curriculum for mastering their profession. James J. Valentine, a former Morgan Stanley analyst, explains everything today's competitive analyst needs to know, providing practical training materials for buyand sell-side research analysis in the United States and globally.

Conveniently organized for use as a learning tool and everyday reference on the job, *Best Practices for Equity Research Analysts* covers the five primary areas of the equity research analyst's role:

- Identifying and monitoring critical factors
- Creating and updating financial forecasts
- Deriving price targets or a range of targets
- Making stock recommendations
- Communicating stock ideas

Expanding upon material covered in undergraduate courses but written specifically to help you perform in the real world, this authoritative book gives you access to the wisdom and expertise of leading professionals in the field. You'll learn best practices for setting up an information hub, influencing others, identifying the critical factors and information sources for better forecasting, creating a better set of financial forecast scenarios, improving valuation and stock-picking techniques, communicating your message effectively, making ethical decisions, and more.

Without *Best Practices for Equity Research Analysts*, you're just treading water in the sink-or-swim world of the equity analyst.

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### Editorial Review

#### 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.

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