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## **Michael Mauboussin**

Michael J. Mauboussin (born February 1964) is Head of Consilient Research at Counterpoint Global. Previously, he was Director of Research at BlueMountain Capital and Head of Global Financial Strategies at Credit Suisse, where he advised clients on valuation and portfolio positioning, capital markets theory, competitive strategy analysis, and decision making.

## **Michael J. Mauboussin - Wikipedia**

Michael Mauboussin is Head of Consilient Research on Counterpoint Global at Morgan Stanley Investment Management. He joined Morgan Stanley in 2020 and has 33 years of investment experience. Prior to joining the firm, he was director of research at BlueMountain Capital Management. Previously, he was head of global financial strategies at Credit Suisse and chief investment strategist at Legg ...

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## **Michael Mauboussin - Morgan Stanley**

Michael Mauboussin has authored several best-selling books including *The Success Equation: Untangling Skill and Luck in Business, Sports, and Investing*; *Think Twice: Harnessing the Power of Counterintuition*; *More Than You Know: Finding Financial Wisdom in Unconventional Places—Updated and Expanded*. *More Than You Know* has been named one of "The 100 Best Business Books of All Time". Michael ...

## **Michael Mauboussin Bio, Books, Papers, Quotes, Research**

Michael Mauboussin (02:53): There are a couple of things, Patrick. First of all, it's great to be with you and great to be with you in person. The first was in 2016, we wrote a piece about, we called it *The Incredibly Shrinking Universe of Companies*. There have been some academic work on this idea called the "Listing Gap." Which if you look at the size of the U.S. economy, and the ...

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Michael Mauboussin is the author of *The Success Equation: Untangling Skill and Luck in Business, Sports, and Investing* (Harvard Business Review Press, 2012), *Think Twice: Harnessing the Power of Counterintuition* (Harvard Business Press, 2009) and *More Than You Know: Finding Financial Wisdom in Unconventional Places-Updated and*

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Expanded (New York: Columbia Business School Publishing, 2008).

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## **Michael J. Mauboussin - Amazon.co.uk**

#203 Michael Mauboussin - Episode Notes. Michael is the author of The Success Equation: Untangling Skill and Luck in Business, Sports, and Investing, Think Twice: Harnessing the Power of Counterintuition, and More Than You Know: Finding Financial Wisdom in Unconventional Places. Michael is currently Head of Consilient Research at Counterpoint Global. Michael has also held roles as Director ...

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Michael Mauboussin: Here's what active managers can do. The debate over active versus passive management continues as trends show the ongoing shift from active into passive funds. Q2 2020 hedge fund letters, conferences and more. At the Morningstar Investment Conference, Michael Mauboussin of Counterpoint Global argued that the rise of index funds has made it more difficult to be an active ...

## **Michael Mauboussin: Here's what active managers can do ...**

When To Trust Your Gut: Michael Mauboussin on Intuition, Technology, and Making Better Decisions [The Knowledge Project Ep. #1] Multiple best selling author and financial strategist Michael Mauboussin ( @mjmauboussin ) shares his wisdom on parenting, daily routines, reading, and how to make better decisions.

## **When To Trust Your Gut: Michael Mauboussin on Intuition ...**

Michael Mauboussin's notes from his presentation at the 2020 Morningstar Investment Conference, held on September 16th and 17th. Q2 2020 hedge fund letters, conferences and more. Michael Mauboussin: Challenges and Opportunities in Active Management Michael Mauboussin is Head of Consilient Research at Counterpoint Global in New York.

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Previously, he was Director of Research BlueMountain Capital ...

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by Michael J Mauboussin; Kenta Tabuchi | 31 May 2013. Tankobon Hardcover The Consumer Staples Industry. by Sanjiv Bhatia, Richard F. Hokenson, et al. | 1 Jan 1996. Paperback The Success Equation (2012) (Korea Edition) by Michael J. Mauboussin | 25 Nov 2015. Paperback (THE SUCCESS EQUATION: UNTANGLING SKILL AND LUCK IN BUSINESS, SPORTS, AND INVESTING ) BY MAUBOUSSIN, MICHAEL J{AUTHOR}Hardcover ...

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Expectations Investing is well worth picking up. -Financial Executive

Expectations Investing offers a fundamentally new alternative for identifying value-price gaps, built around a deceptively simple and obvious tool: a company's stock price. The authors walk readers step-by-step through their breakthrough method, revealing how portfolio managers, security analysts, investment advisors, and individual investors can more accurately evaluate established and "new economy" stocks alike-and translate shareholder value from theory to reality.

AUTHORBIO: Alfred Rappaport directs Shareholder Value Research for L.E.K. Consulting and is a Professor Emeritus at Northwestern's Kellogg School. Michael J. Mauboussin is Credit Suisse First Boston's Chief U.S. Investment Strategist and an adjunct professor at Columbia University.

Since its first publication, Michael J. Mauboussin's popular guide to wise investing has been translated into eight languages and has been named best business book by BusinessWeek and best economics book by Strategy+Business. Now updated to reflect current research and expanded to include new chapters on investment philosophy, psychology,

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and strategy and science as they pertain to money management, this volume is more than ever the best chance to know more than the average investor. Offering invaluable tools to better understand the concepts of choice and risk, *More Than You Know* is a unique blend of practical advice and sound theory, sampling from a wide variety of sources and disciplines. Mauboussin builds on the ideas of visionaries, including Warren Buffett and E. O. Wilson, but also finds wisdom in a broad and deep range of fields, such as casino gambling, horse racing, psychology, and evolutionary biology. He analyzes the strategies of poker experts David Sklansky and Puggy Pearson and pinpoints parallels between mate selection in guppies and stock market booms. For this edition, Mauboussin includes fresh thoughts on human cognition, management assessment, game theory, the role of intuition, and the mechanisms driving the market's mood swings, and explains what these topics tell us about smart investing. *More Than You Know* is written with the professional investor in mind but extends far beyond the world of economics and finance. Mauboussin groups his essays into four parts—Investment Philosophy, Psychology of Investing, Innovation and Competitive Strategy, and Science and Complexity Theory—and he includes substantial references for further reading. A true eye-opener, *More Than You Know* shows how a multidisciplinary approach that pays close attention to process and the psychology of decision making

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offers the best chance for long-term financial results.

Examines the importance of skill and luck, describes how to develop analytical tools to understand them, and offers suggestions on putting these findings to work to achieve success.

No matter your field, industry, or specialty, as a leader you make a series of crucial decisions every single day. And the harsh truth is that the majority of decisions—no matter how good the intentions behind them—are mismanaged, resulting in a huge toll on organizations, the people they employ, and even the people they serve. So why is it so hard to make sound decisions? In *Think Twice*, now in paperback, Michael Mauboussin argues that we often fall victim to simplified mental routines that prevent us from coping with the complex realities inherent in important judgment calls. Yet these cognitive errors are preventable. In this engaging book, Mauboussin shows us how to recognize and avoid common mental missteps. These include misunderstanding cause-and-effect linkages, not considering enough alternative possibilities in making a decision, and relying too much on experts. Through vivid stories, the author presents memorable rules for avoiding each error and explains how to recognize when you should “think twice”—questioning your reasoning and adopting decision-making

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strategies that are far more effective, even if they seem counterintuitive. Armed with this awareness, you'll soon begin making sounder judgment calls that benefit (rather than hurt) your organization.

High Performing Investment Teams "Although most leaders agree teamwork is important, few businesses effectively build collaborative, synchronized teams. High Performing Investment Teams is an excellent guidepost for any manager striving to create a winning team and develop bench strength for the future." –John W. Rogers Jr., Chairman and Chief Executive Officer, Ariel Capital Management, LLC "Turning individual talent into team performance is the ultimate challenge for an investment organization, but also the key to building a sustainable investment franchise. Focus Consulting has captured the essence of how to leverage your intellectual capital for maximum and enduring success." –Michelle R. Seitz, CFA, Principal, Head of Investment Management, Executive Committee Member, William Blair & Company, LLC "Focus Consulting's work on behaviors of top teams is clear, effective, and practical. We recommend it highly for investment firms that are serious about world-class collaboration." –Terry Toth, President, Northern Trust Global Investments "Focus Consulting really understands that attracting and motivating talented people makes all

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the difference for asset managers. Their work is based on years of experience helping investment firms build strong cultures with productive behaviors." –Scott Powers, Chief Executive Officer, Old Mutual Asset Management "Focus Consulting understands the people aspect of the investment business. They know the investment business and how to make collaboration work." –Harin de Silva, PhD, CFA, President, Analytic Investors

Reveals the proprietary framework used by an exclusive community of top money managers and value investors in their never-ending quest for untapped investment ideas Considered an indispensable source of cutting-edge research and ideas among the world's top investment firms and money managers, the journal *The Manual of Ideas* boasts a subscribers list that reads like a Who's Who of high finance. Written by that publication's managing editor and inspired by its mission to serve as an "idea funnel" for the world's top money managers, this book introduces you to a proven, proprietary framework for finding, researching, analyzing, and implementing the best value investing opportunities. The next best thing to taking a peek under the hoods of some of the most prodigious brains in the business, it gives you uniquely direct access to the thought processes and investment strategies of such super value investors as Warren Buffett, Seth

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Klarman, Glenn Greenberg, Guy Spier and Joel Greenblatt. Written by the team behind one of the most read and talked-about sources of research and value investing ideas Reviews more than twenty pre-qualified investment ideas and provides an original ranking methodology to help you zero-in on the three to five most compelling investments Delivers a finely-tuned, proprietary investment framework, previously available only to an elite group of TMI subscribers Step-by-step, it walks you through a proven, rigorous approach to finding, researching, analyzing, and implementing worthy ideas

The Acquirer's Multiple: How the Billionaire Contrarians of Deep Value Beat the Market is an easy-to-read account of deep value investing. The book shows how investors Warren Buffett, Carl Icahn, David Einhorn and Dan Loeb got started and how they do it. Carlisle combines engaging stories with research and data to show how you can do it too. Written by an active value investor, The Acquirer's Multiple provides an insider's view on deep value investing. The Acquirer's Multiple covers: How the billionaire contrarians invest How Warren Buffett got started The history of activist hedge funds How to Beat the Little Book That Beats the Market A simple way to value stocks: The Acquirer's Multiple The secret to beating the market How Carl Icahn got started How David Einhorn and Dan Loeb got started The 9 rules of

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deep value The Acquirer's Multiple: How the Billionaire Contrarians of Deep Value Beat the Market provides a simple summary of the way deep value investors find stocks that beat the market.

In this substantially revised and updated edition of his 1986 business classic, *Creating Shareholder Value*, Alfred Rappaport provides managers and investors with the practical tools needed to generate superior returns. The ultimate test of corporate strategy, the only reliable measure, is whether it creates economic value for shareholders. After a decade of downsizings frequently blamed on shareholder value decision making, this book presents a new and indepth assessment of the rationale for shareholder value. Further, Rappaport presents provocative new insights on shareholder value applications to: (1) business planning, (2) performance evaluation, (3) executive compensation, (4) mergers and acquisitions, (5) interpreting stock market signals, and (6) organizational implementation. Readers will be particularly interested in Rappaport's answers to three management performance evaluation questions: (1) What is the most appropriate measure of performance? (2) What is the most appropriate target level of performance? and (3) How should rewards be linked to performance? The recent acquisition of Duracell International by Gillette is analyzed in detail, enabling the reader

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to understand the critical information needed when assessing the risks and rewards of a merger from both sides of the negotiating table. The shareholder value approach presented here has been widely embraced by publicly traded as well as privately held companies worldwide. Brilliant and incisive, this is the one book that should be required reading for managers and investors who want to stay on the cutting edge of success in a highly competitive global economy.

The story of the origins and development of Peter Cundill's pioneering investment journey.

The economic climate is ripe for another golden age of shareholder activism. *Deep Value: Why Activist Investors and Other Contrarians Battle for Control of Losing Corporations* is a must-read exploration of deep value investment strategy, describing the evolution of the theories of valuation and shareholder activism from Graham to Icahn and beyond. The book combines engaging anecdotes with industry research to illustrate the principles and methods of this complex strategy, and explains the reasoning behind seemingly incomprehensible activist maneuvers. Written by an active value investor, *Deep Value* provides an insider's perspective on shareholder activist strategies in a format accessible to both professional investors and laypeople.

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The Deep Value investment philosophy as described by Graham initially identified targets by their discount to liquidation value. This approach was extremely effective, but those opportunities are few and far between in the modern market, forcing activists to adapt. Current activists assess value from a much broader palate, and exploit a much wider range of tools to achieve their goals. Deep Value enumerates and expands upon the resources and strategies available to value investors today, and describes how the economic climate is allowing value investing to re-emerge. Topics include: Target identification, and determining the most advantageous ends Strategies and tactics of effective activism Unseating management and fomenting change Eyeing conditions for the next M&A boom Activist hedge funds have been quiet since the early 2000s, but economic conditions, shareholder sentiment, and available opportunities are creating a fertile environment for another golden age of activism. Deep Value: Why Activist Investors and Other Contrarians Battle for Control of Losing Corporations provides the in-depth information investors need to get up to speed before getting left behind.

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