



The Ivy Portfolio: How to Invest Like the Top Endowments and Avoid Bear Markets

By Mebane T. Faber, Eric W. Richardson



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A do-it-yourself guide to investing like the renowned Harvard and Yale endowments.

The Ivy Portfolio shows step-by-step how to track and mimic the investment strategies of the highly successful Harvard and Yale endowments. Using the endowment Policy Portfolios as a guide, the authors illustrate how an investor can develop a strategic asset allocation using an ETF-based investment approach.

The Ivy Portfolio also reveals a novel method for investors to reduce their risk through a tactical asset allocation strategy to protect them from bear markets. The book will also showcase a method to follow the smart money and piggyback the top hedge funds and their stock-picking abilities. With readable, straightforward advice, *The Ivy Portfolio* will show investors exactly how this can be accomplished—and allow them to achieve an unparalleled level of investment success in the process.

With all of the uncertainty in the markets today, *The Ivy Portfolio* helps the reader answer the most often asked question in investing today - "What do I do"?

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Editorial Review

Review

"The most useful recent book could be *The Ivy Portfolio: How to Invest Like the Top Endowments and Avoid Bear Markets*, by money managers Mebane Faber and Eric Richardson, who work at Cambria Investment Management. They analyze how the endowments of Harvard and Yale posted such world-beating performance. Then they offer a simplified model that regular people can adopt."—*BusinessWeek* (April 9, 2009)

"Markets left investors almost no place to hide last year, with nearly every asset class heading south. Money manager Mebane Faber of Cambria Investment Management outperformed by a mile, however....Faber is co-author of the *The Ivy Portfolio*, which details his approach. Following the investment tenets of the Harvard and Yale endowments (which until last year both had sterling performance) but without using their riskier alternative assets, he demonstrates how to outperform with lower volatility."—*Barron's* (April 27, 2009)

"Does the Ivy Portfolio deserve a spot on Dad's bookshelf? With its graphics, tables and step-by-step guidance, the book is often more straightforward than a college financial aid form."—*Wall Street Journal* (June 16, 2009)

From the Inside Flap

Over the past twenty years, the Yale University and Harvard University endowments have achieved unprecedented investment success. Since 1985, the Yale University endowment returned 16.62% per year, easily surpassing the S&P 500 Index's 11.98% return. The Harvard University endowment returned over 15% a year—and both endowments achieved these results with significantly less volatility than the S&P 500.

Despite the general success of the top endowments, 2008 proved difficult for many buy-and-hold investors as well as the endowments. Many asset classes finished the year with declines of 30% or more.

The Ivy Portfolio shows how individual investors can mimic the stellar long-term investment track records of these top endowments while avoiding bear markets like 2008.

The Ivy Portfolio begins by examining the theory, process, and discipline behind the success of the Yale University and Harvard University endowments. It demystifies the techniques that the ivory-tower academic practitioners use to manage their portfolios and shows step by step how an individual investor can hope to duplicate their returns using an innovative ETF-based investment strategy.

The Ivy Portfolio then demonstrates a simple tactical asset approach to dampen the impact of bear markets on long-term investment results. The model would have protected an investor from the carnage of 2008, all while eliminating the uncertainty and emotions of investing.

The Ivy Portfolio also showcases a method to piggyback the stock-picking abilities of top hedge funds, allowing investors to achieve greater success by following the valuation insights of the smart money.

The Ivy Portfolio will show investors exactly how all this can be accomplished—and allow them to achieve an unparalleled level of investment success in the process.

From the Back Cover

"We all know that the most impressive investment returns are from endowment funds and, in particular, Yale and Harvard. Faber and Richardson take us inside these two funds and show us how to replicate that model for our portfolios. *The Ivy Portfolio* is an easy to read and understand book that will make the process of asset allocation and investment easier for readers. And in light of the recent market turmoil, its lessons are even more important."

—**John Mauldin**, author of the bestselling *Bull's Eye Investing* and the weekly newsletter *Thoughts from the Frontline*

"Meb Faber makes a most compelling case for quantitative active asset allocation. Investors of all levels of sophistication will benefit handsomely from the insights and analyses presented in *The Ivy Portfolio*."

—**Rob Arnott**, Chairman, and Jason Hsu, Chief Investment Officer, Research Affiliates, LLC; coauthors of *The Fundamental Index: A Better Way to Invest*

"Analysis of institutional holdings (13F analysis) is one of the most useful yet underused tools in an investor's research arsenal. Along with taking readers into the arcane world of endowment investing, *The Ivy Portfolio* provides actionable advice on how to trade alongside the top investment professionals of our time."

—**Justin Walters**, cofounder, Bespoke Investment Group LLC

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"[Faber and Richardson] analyze how the endowments of Harvard and Yale posted such world-beating performance. Then they offer a simplified model that regular people can adopt."

—**Bloomberg Businessweek**

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Eleanor Yoo:

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Ann Fortune:

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