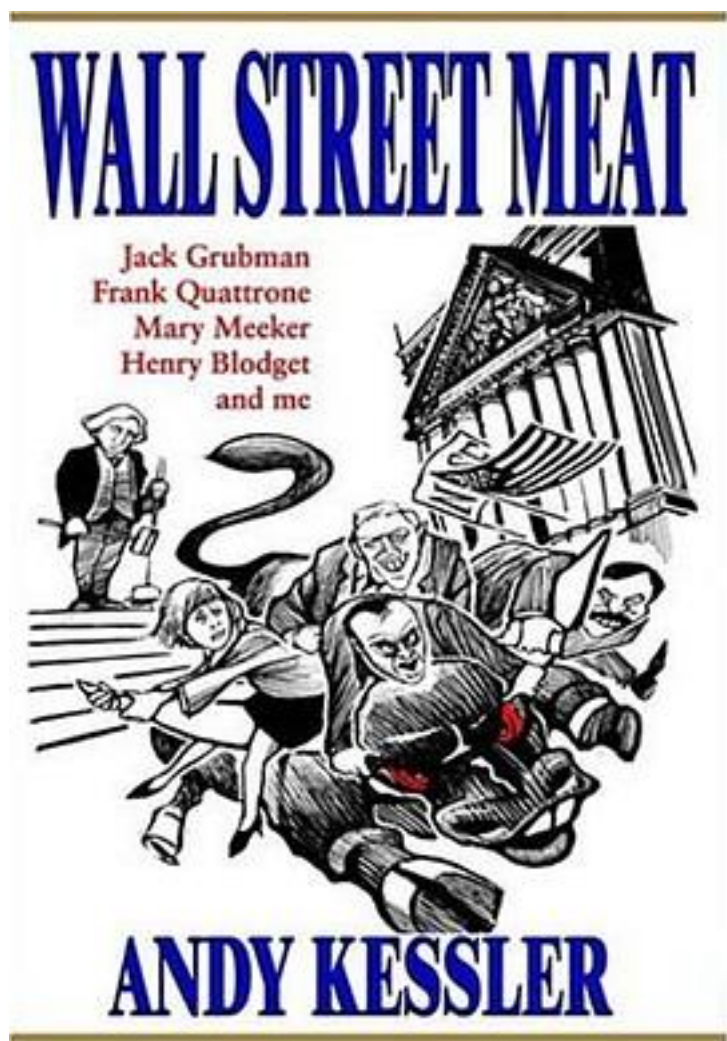


# Wall Street Meat



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著者:Andy Kessler

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From Publishers Weekly

When Kessler interviewed for an analyst's position at Paine Webber in 1986, he wasn't even sure what the job entailed, but would soon learn there were "absolutely no qualifications whatsoever" for the responsibility of telling investors how to build their stock portfolios. He did happen to meet the right people, however: he palled around with Jack Grubman and then, at a subsequent job at Morgan Stanley, worked with Frank Quattrone and Mary Meeker—three analysts who later acquired varying levels of fame and notoriety during the boom-and-bust market of the late 1990s, as they were accused of deliberately recommending stocks from tech companies they knew to be overvalued. Henry Blodget was also implicated in the ensuing scandal, but despite his prominence on the cover, he has no substantial presence in this story, just a few cameos well after Kessler left Wall Street to run an investment firm in California. The subtletal implication that Wall Street "chewed up" these figures is also misleading; the men were at the top of their game when they were forced out, while Meeker has at this writing suffered nothing more than slight damage to her reputation. Kessler's denigration of her as a "clueless" rookie who became a technology "cheerleader" risks overstating the case against her as a means of pumping up the reputation of otherwise "pure analysts." False modesty and clunky dialogue do little to enhance a story that relies too heavily on Kessler's former proximity to now-famous people, while his analysis of their legal woes rarely advances beyond the superficial. Readers seeking insight into the blurring of the boundaries between investment bankers and stock analysts should wait for a book that tells that story directly, with a fuller perspective.

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Michael Lewis, author of *Liar's Poker*, *The New New Thing*

A deliciously naughty new book... I finished it in a gulp, perfectly astonished." --This text refers to an out of print or unavailable edition of this title.

Rich Karlgaard, Publisher, *Forbes Magazine*, March 2003

This book is gripping, like watching the Zapruder film versus reading the Warren report, I couldn't put it down. --This text refers to an out of print or unavailable edition of this title.

CBS Marketwatch, Bambi Francisco

A fun read. Andy Kessler makes use of his pen, wit and cynical outlook. --This text refers to an out of print or unavailable edition of this title.

CNBC, James Cramer, Kudlow & Cramer

This book is a hoot. --This text refers to an out of print or unavailable edition of this title.

Robert Teitelman, *The Daily Deal*, April 4, 2003

Now arrives a fascinating little testimony from Andy Kessler...breezy, Wall Street-y style. He can be quite funny. --This text refers to an out of print or unavailable edition of this title.

Bambi Francisco, CBS MarketWatch, March 11, 2003

It's funny and brings characters to life. Andy Kessler makes use of his pen, wit and cynical outlook. --This text refers to an out of print or unavailable edition of this title.

FierceFinance April 23, 2003

"Fascinating book full of biting humor and cynicism that's informed by firsthand experiences in a crazy industry." --This text refers to an out of print or unavailable edition of this title.

Adam Lashinsky, Fortune - CNN/Money April 23, 2003

"A scathing critique of everything wrong with Wall Street ... and what's wrong with a few of the critics as well. --This text refers to an out of print or unavailable edition of this title.

## Product Description

Wall Street is a funny business. All you have is your reputation. Taint it and someone else will fill your shoes. Longevity comes from maintaining that reputation.

Ask Jack Grubman, the All-Star telecom analyst from Salomon Smith Barney; uber-banker Frank Quattrone at CS First Boston; Morgan Stanley's Mary "Queen of the Net" Meeker; or Merrill Lynch's Henry Blodget.

Well, they probably won't tell you anything. But have I got some great stories for you.

Successful hedge fund manager Andy Kessler looks back on his years as an analyst on Wall Street and offers this cautionary tale of the intoxicating forces loose in the world of finance that overwhelmed sober analysis.

## From the Author

Wall Street is a funny business. All you have is your reputation. Taint it and someone else will fill your shoes. Longevity comes from maintaining that reputation.

Ask Jack Grubman, the All-Star telecom analyst from Salomon Smith Barney stuck recommending the Worldcom and Global Crossing disasters. Or uber-banker Frank Quattrone, who did a few too many skanky IPOs at CS First Boston. Or Morgan Stanley's Mary "Queen of the Net" Meeker. Or Henry Blodget, whose \$400 price target on Amazon.com's stock got him a job at Merrill Lynch.

They probably won't tell you anything. But I will. I sat next to Jack Grubman when we both started at Paine Webber. Later at Morgan Stanley, I did deals with Frank Quattrone and was a mentor to Mary Meeker. During the heat of the Internet bubble, I befriended Henry Blodget. Have I got some great stories for you.

Add to these four folks the strategists and axes, barking dogs and Piranhas, ducks and momos, Vomit Comets and Joe Six-Stock, and you'll get a clear picture of how Wall Street works and how analysts and bankers went from merely being famous to become notorious.

We really were just pieces of Wall Street Meat. The Street is a disgustingly lucrative

capital-raising machine -- its players keep half of the revenues they generate. The tales of Jack, Frankie, Mary, Henry and all the rest of us are important, if only to show how powerful and then how fickle Wall Street can be. Creeping hubris is terminal. --This text refers to an out of print or unavailable edition of this title.

作者介绍:

After turning \$100 million into \$1 billion riding the technology wave of the late 1990s, Andy Kessler recounted his experiences on Wall Street and in the trenches of the hedge fund industry in the books Wall Street Meat and Running Money (and its companion volume, How We Got Here). Though he has retired from actively managing other people's money, he remains a passionate and curious investor. Unable to keep his many opinions to himself, he contributes to the Wall Street Journal, Wired, and lots of Web sites on a variety of Wall Street and technology-related topics, and is often seen on CNBC, FOX, and CNN. He lives in Silicon Valley like all the other tech guys.

目录:

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标签

金融

华尔街

WallStreet

Research

Finance

商业史

分析师

英文

## 评论

我又看了一遍英文 作为地铁读物实在太棒了 都是梗！ 能黑人！  
过两天我千万得找个机会去黑东京研究部主任这事、、

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mary meeker竟然跳槽了

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在华尔街工作不就为了赚钱吗？

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公司里有人提到所以读了一下（第一章和最后一张）。给outsider看看还差不多。

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另外一個TMT的基金經理，非常生動寫實的了解分析員生活的書。

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第一本英文书，今天读完的，内容不错，纪念一下。

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哎呀，我本来想写这样一本书来透视这个行业的，已经有前辈写了啊，看来得再琢磨琢磨别的idea

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## 书评

肉、谎言与娱乐圈——关于华尔街的另类描述 本力，《中国图书商报》  
71年前的1935年春天，在缅因州岸边的小岛农场里，摩根财团将摩根银行拆分成两部分：一部分为JP摩根，继续从事传统的商业银行业务；另一部分被分离出来，成立一

家完全独立的投资银行，名叫摩根士丹利。...

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99-2000年泡沫时期，一些明星分析师出尽风头，投资者追捧他们，他们则追捧一些网络股。泡沫破灭后，四大明星分析师中的三位被起诉，网络股女皇玛丽·米克逃过一劫。这本书要告诉我们的，就是分析师和投资银行联手的秘密。凯斯勒曾经是华尔街的著名分析师，但在互联网泡沫泛滥...

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宁为斧头，不为鱼肉——读安迪·凯斯勒《华尔街的肉》 【读品】李华芳  
华尔街被投资者形象地称为绞肉机，其形象比吴敬琏喻为“赌场”的中国股市好不到哪里去。能从中全身而退的，寥寥无几。所以当安迪·凯斯勒从华尔街的股市绞肉机中死里逃生之后，难免像《肖深克的救赎...

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《操纵金钱》和《华尔街的肉》是安迪凯斯勒一个人写的两本书，主题是高科技证券，前者偏高科技多一些，后者偏金融多一些。  
安迪.凯斯勒的出身是一名AT&T的工程师，80年代阴差阳错的进入证券市场。80年代的安迪主要从事IT行业证券分析，也就是我们都耳熟能详的证券分析员。90年...

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中国的股市曾走出了令人瞠目结舌的牛市，也迅速跌倒了个目瞪口呆，问其幕后推手，乃一帮帮大言不惭的研究员。  
回想起，中国人寿上市的时候，招商一人一份“3年90”的报告，当时看来像个童话，现在看是个神话，同样又是他们，在08年策略的时候，抛出个10000点的目标把多少人留在...

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“我只是股市绞肉机里一块肉” 尽管跻身华尔街“全明星”分析师队列，身为美国盈利第四的对冲基金管理人，安迪.凯斯勒却如是评价自己的华尔街经历。从贝尔软件工程师到潘恩.韦伯投资公司的投资分析师，再从业内排名第二的金牌投资分析师到摩根士丹利，安迪.凯斯勒见证了科技股的...

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从华尔街“逃”出来的“全明星分析师”安迪·凯斯勒是一个有趣的人，他的两本有趣的书《操纵金钱》、《华尔街的肉》已经证明了这一点。  
1985年，凯斯勒26岁。他一身“科技怪客时尚”装束从贝尔实验室电机工程师来到华

尔街，穿上西装，变成一名分析师。11年后，已经成为摩根...

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前段时间和一个券商的分析师聊到玛丽米克，他推荐了这本书，说里面也写到了米克发迹的过程。今天读了这本薄薄的小书，很有意思，也很值得琢磨。分析师这个职业，很具有迷惑性，外人第一次听说往往不知道是做什么的，而这个行业里的人，往往做着做着就晕了，自己也不知道自己...

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虽然名字叫作“华尔街的肉”，实际上，股票指数的涨跌能够影响你对这些词语的关注度，却不会影响它的内核。<sup>\*</sup>从我初读这本书到现在，这个世界的气旋和洋流不知道已经变幻过多少个回合了。但这本书的价值既不更多，也不更少。<sup>\*</sup>这本书叙述的是若干年前高科技泡沫腾起与破灭的...

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如果你喜欢本报曾经推荐过的《诚信的背后》一书，那么相信你也该喜欢《华尔街的肉》，因为它们同属打破华尔街神话的题材。此书的作者是安迪·凯斯勒，一位前华尔街分析师，后来改而从事投资经理的工作，前不久刚刚来国内做过演讲，也算是近期人气颇高的美国投资高人。...

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在食物链里，食草动物是食肉动物的肉，而食肉动物是人的肉。人是自己人的肉。我们何尝不是别人的肉，员工是经理人的肉，经理人是股东的肉。世界就像那奔流不止的水一样，无限迭代循环下去。这本书写得很好，也译得好，看起来很顺畅。也让我了解股市里面的食物链的皮毛。银行只是...

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10月工作之余，阅读过《华尔街的肉》一书，这是行业研究员现身说法，对神秘的华尔街的揭密之作：回顾自己曾担任投资分析师的20年生涯，安迪·凯斯勒以轻松诙谐的笔调将读者带入一个光怪陆离的华尔街世界，领略到华尔街的稀奇古怪、百态尽出。虽说投资顾问与行业研究员供职于...

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这是一本真正在华尔街从业，并有过辉煌历史的家伙写的书。在时间上这本书从描述了上世纪80年代一直到本世纪初互联网泡沫破灭期间的华尔街。这20年间作者的身份和思想都在发生变化，从分析师到策略师到投资人，给了我们一个生动的华尔街形象。

华尔街本来的设计初衷是很好的。...

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这本书看的还是很快的，大概看了3天吧，不到，就看完了。没有什么难以理解的东西。说实话，我个人觉得这本书不怎么样，讲的是关于分析师在顶尖投行做的事情。当然了，作者对投行的价值观的转化做了批判。这点在看了几本书后读者们应该都已经意识到了吧。可笑了些。投行...

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第一遍看完感觉很棒，再次翻阅时才发现原来翻译还是一如既往的肉。。。好好的销售变成了营业员，这叫一个别扭哟。。。一直把这本书作为和对冲基金风云录的最佳组合来推荐，书中的那些人物和故事，虽然和我没有直接的关联，但都是那么的亲切，那么的生动，总是让我不禁回想起...

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投资理念和投资技巧不难形成，能不畏浮云遮望眼，简单从容地操作才是投资的王道啊。还是应了那句话：认准自己该做的事或是值得做的事，认真去做。现如今，价值投资和基本面研究成为潜意识流，技术分析和概率判断反倒成了日常操作的主流工具。

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1985年，安迪·凯斯勒以一名AT&T的软件工程师的身份阴差阳错地进入证券市场，此后他的身份和思想都在不断地发生变化，从分析师到策略师，再到投资人。在互联网的泡沫鼎盛之时，预感不详的安迪·凯斯勒抽身离去——尽管此时他的不少老朋友还是继续留在华尔街，为网络股上市摇旗...

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像读小说一样轻松，了解华尔街的重重内幕，读过之后感觉到那些金融巨头的当下遭遇的危机其实早已是诱因深种了。此时此刻重温这本书很有意义。

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