

Investment and Hedge Fund Performance Innovation Course

18 – 22 July 2027
Chicago

AGILE LEADERS
Training Center

AGILE LEADERS
Training Center

Investment and Hedge Fund Performance Innovation Course

Ref: 432_134952 **Date:** 18 – 22 July 2027 **Location:** Chicago **Fees:** 12000 Euro

Overview

Investment and Hedge Fund Performance Innovation Course is a one-week advanced course for fund leaders, portfolio managers, risk teams, operations leaders, and innovation teams, who leave with a Fund Innovation Execution Roadmap. Participants apply hedge fund performance innovation, investment process innovation, portfolio operating model design, responsible AI governance, and operational resilience planning to measurable fund priorities. The course connects controlled experiments, data use, vendor choices, risk boundaries, and performance evidence. Agile Leaders Training Center delivers this investment fund innovation course.

Who Should Attend

- Investment leadership functions responsible for fund strategy and performance priorities
- Portfolio functions responsible for research, construction, monitoring, and decision quality
- Risk and compliance functions responsible for control boundaries and oversight evidence
- Fund operations functions responsible for workflows, data, vendors, and service resilience
- Technology and innovation functions responsible for experimentation and adoption decisions

The course assumes participants influence investment or operating decisions and leaves out basic fund accounting, introductory portfolio theory, and generic creativity methods.

Departments and Industries

The course supports functions that improve investment decisions and fund operations across institutional and alternative investment settings.

- Asset management and hedge fund investment teams
- Private capital and family office operations
- Banking investment and treasury functions
- Insurance investment and risk functions
- Financial technology and data service teams

Learning Objectives

By the end of this course, participants will be able to:

- Diagnose performance constraints across investment and operating workflows
- Build a target portfolio operating model with decision rights
- Evaluate data, technology, and vendor options against fund needs
- Apply controlled experimentation with risk and ethical boundaries
- Prioritize innovation initiatives using value, risk, and feasibility evidence
- Create a governed Fund Innovation Execution Roadmap

Course Agenda

Day 1: Fund Performance Diagnosis

- Fund Performance Driver Tree
- Investment Decision Process Map
- Portfolio Outcome Attribution Canvas
- Operating Friction Evidence Log
- Performance Constraint Prioritization Matrix

Day 2: Investment Operating Model Design

- Portfolio Operating Model Blueprint
- Research-to-Decision Workflow Map
- Investment Committee Decision Rights Matrix
- Data Lineage and Quality Map
- Target Workflow Control Design

Day 3: Technology and Experimentation

- Investment Technology Use-Case Canvas
- Alternative Data Evaluation Checklist
- Responsible AI Governance Guardrails
- Risk-Aware Experiment Charter
- Experiment Success Measure Sheet

Day 4: Governance and Scaled Execution

- Technology Vendor Due Diligence Scorecard
- Operational Resilience Scenario Map
- Innovation Risk and Control Register
- Value-Risk-Feasibility Portfolio Matrix
- Innovation Governance RACI

Day 5: Fund Innovation Practice

- Exercise: Performance Constraint Diagnosis
- Exercise: Operating Model Challenge
- Exercise: Technology Experiment Review
- Exercise: Innovation Portfolio Decision
- Capstone Fund Innovation Execution Roadmap

Practical Exercises

The course includes the following suggested activities:

- Suggested activity: trace a portfolio decision from research evidence through approval and monitoring
- Suggested activity: test a technology use case against value, data, control, and vendor criteria
- Suggested activity: evaluate an innovation portfolio under performance and operational-risk constraints
- Suggested activity: sequence owners, measures, controls, and review gates in an execution roadmap

Frequently Asked Questions

Who suits the Investment and Hedge Fund Performance Innovation Course?

The course suits fund leaders and investment, portfolio, risk, operations, technology, and innovation functions; it assumes participants influence fund decisions or operating workflows.

How does hedge fund performance innovation differ from generic innovation leadership?

Hedge fund performance innovation focuses on investment workflows, portfolio evidence, operating controls, data, technology, vendors, and fund governance rather than general culture or idea-generation techniques.

How can investment process innovation improve decision quality?

Investment process innovation makes evidence flows, decision rights, control points, feedback loops, and performance measures explicit so teams can diagnose friction and test targeted changes.

What makes responsible AI governance relevant to investment funds?

Responsible AI governance defines permitted uses, human oversight, data controls, model-risk questions, accountability, monitoring, and escalation before technology enters investment or operating decisions.

AGILE LEADERS
Training Center

How should a fund prioritize innovation initiatives?

A fund should compare initiatives using strategic value, performance evidence, implementation feasibility, data readiness, operational risk, control requirements, cost logic, and measurable review gates.

Conclusion

Participants take back a Fund Innovation Execution Roadmap and supporting diagnostic, operating-model, experiment, vendor, risk, and governance artifacts. The roadmap replaces disconnected technology ideas with sequenced decisions tied to fund priorities. It clarifies owners, evidence, controls, measures, dependencies, and review gates for investment and operating teams.