



Hedge Fund Strategies, Risk and Due Diligence Course

11 – 15 January 2027
Lisbon



AGILE LEADERS
Training Center

Hedge Fund Strategies, Risk and Due Diligence Course

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Overview

Hedge Fund Strategies, Risk and Due Diligence Course is a five-day foundation-to-intermediate course for investment analysts, portfolio professionals, family office teams, wealth managers, risk staff, and institutional investors, who leave with a Hedge Fund Evaluation File. The course connects fund structures, strategy behavior, fees, leverage, liquidity, performance evidence, manager selection, operational controls, portfolio allocation, and ongoing monitoring. Agile Leaders Training Center delivers practical hedge fund evaluation and due diligence training.

Who Should Attend

- Investment functions responsible for researching alternative investment opportunities
- Portfolio functions responsible for allocation and diversification decisions
- Family office functions responsible for external manager selection
- Wealth advisory functions responsible for suitability and risk communication
- Risk functions responsible for leverage, liquidity, and counterparty exposure
- Oversight functions responsible for manager monitoring and governance evidence

The course assumes participants already review investment information or support portfolio decisions and leaves out advanced derivatives pricing, fund formation legal drafting, and technology transformation.

Departments and Industries

The course supports departments that evaluate pooled investments, external managers, portfolio risk, and governance across institutional and advisory settings.

- Asset management and alternative investment teams
- Family offices and private wealth functions
- Pension, endowment, and insurance investment functions
- Banking investment and treasury departments
- Risk, compliance, audit, and operational oversight teams
- Investment consulting and fiduciary advisory functions

Learning Objectives

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



- Compare hedge fund structures and strategy families
- Analyze leverage, liquidity, valuation, and counterparty risks
- Apply risk-adjusted performance and fee measures
- Evaluate investment and operational due diligence evidence
- Build manager selection and monitoring scorecards
- Use portfolio allocation criteria for hedge fund decisions

Course Agenda

Day 1: Hedge Fund Structure and Terms

- Private Fund Structure and Stakeholder Map
- Offering Document Review Checklist
- Management and Performance Fee Waterfall
- High-Water Mark and Hurdle Rate Worksheet
- Subscription, Redemption, Gate, and Lockup Terms Matrix

Day 2: Hedge Fund Strategy Families

- Long-Short Equity Exposure Map
- Event-Driven Strategy Scenario Grid
- Relative-Value Arbitrage Position Map
- Global Macro and Managed Futures Driver Matrix
- Multi-Strategy and Fund-of-Funds Comparison

Day 3: Performance and Risk Analysis

- Return Stream and Benchmark Comparison Sheet
- Volatility, Drawdown, and Downside Risk Dashboard
- Risk-Adjusted Performance Measure Set
- Leverage and Gross-Net Exposure Schedule
- Liquidity, Valuation, and Counterparty Risk Register

Day 4: Manager Due Diligence and Allocation

- Investment Due Diligence Question Set
- Operational Due Diligence Control Review
- People, Process, and Philosophy Assessment
- Manager Selection Weighted Scorecard
- Portfolio Role and Allocation Decision Matrix



Day 5: Hedge Fund Evaluation Practice

- Exercise: Strategy Classification and Return Driver Review
- Exercise: Fee and Performance Evidence Analysis
- Exercise: Leverage, Liquidity, and Counterparty Risk Review
- Exercise: Manager Due Diligence Committee Decision
- Capstone Exercise: Hedge Fund Evaluation File

Practical Exercises

The course includes the following suggested activities:

- Suggested activity: classify sample hedge funds by strategy, instruments, return drivers, leverage, liquidity, and likely stress behavior.
- Suggested activity: calculate fee effects and compare risk-adjusted performance, drawdowns, and benchmark evidence.
- Suggested activity: evaluate investment and operational due diligence responses using a weighted manager scorecard.
- Suggested activity: document allocation conditions, monitoring indicators, escalation triggers, and committee conclusions.

FAQs

Who suits hedge fund strategies and due diligence training, and what does it assume?

Hedge fund strategies and due diligence training suits investment, portfolio, family office, wealth, risk, and oversight functions and assumes participants already review investment information or support portfolio decisions.

How does hedge fund due diligence differ from fund innovation training?

Hedge fund due diligence evaluates structures, strategies, risks, performance, managers, operations, and allocation evidence, while fund innovation training focuses on changing workflows, technology use, and operating models.

What risks should a hedge fund evaluation examine?

A hedge fund evaluation should examine market exposure, leverage, liquidity, valuation, counterparty concentration, operational controls, key-person dependence, redemption terms, and how those risks behave under stress.



How are hedge fund managers compared fairly?

Hedge fund managers are compared through strategy-consistent benchmarks, risk-adjusted measures, drawdowns, exposure data, process evidence, operational controls, fees, liquidity terms, and qualitative due diligence.

What role can hedge funds play in portfolio allocation?

Hedge funds can provide differentiated return drivers or diversification, but allocation depends on objectives, liquidity needs, fee impact, transparency, governance capacity, and tolerance for strategy-specific risks.

Conclusion

Participants take back a Hedge Fund Evaluation File containing structure maps, strategy comparisons, fee and performance worksheets, risk registers, due diligence questions, manager scorecards, and allocation criteria. The file replaces fragmented reviews with a consistent evaluation sequence. It supports documented selection, portfolio, monitoring, and escalation decisions.