

Hedge Funds

Building and monitoring an equity thesis.



Delivery	In person, virtual or hybrid
Cohort size	2 to any size
Duration	2 days (modular)
Level	Intermediate to Advanced
Pricing	Available on enquiry

Overview

The fundamental equity playbook: how to create a differentiated thesis, do the diligence, and monitor a position through earnings and catalysts. Built around how investors actually think, not textbook theory.

Who it's for: Hedge fund analysts, portfolio managers, and fundamental investors.

What you'll cover

- Creating a differentiated equity thesis and variant perception
- Primary and secondary diligence
- Building the model that matters for the marginal dollar
- Position sizing, risk and reward, and portfolio construction
- Monitoring: quarterly earnings, milestones and catalysts
- Updating the thesis and knowing when you are wrong

Learning outcomes

- Construct a differentiated long or short thesis with a clear variant view
- Conduct primary and secondary diligence to test the thesis
- Size a position against its risk and reward within a portfolio
- Monitor and update the thesis through earnings, milestones and catalysts

Every course is tailored to the counterpart, cohort and desk. To discuss a programme or request pricing, contact us at surojit.chakraverti@3wavecap.com.