



SHARPEN YOUR EDGE™

Entering the World of Hedge Funds – Opportunities & Obstacles in Targeting the Affluent



RESEARCH STUDY

Whether you are an established player or a new entrant, *Entering the World of Hedge Funds* examines the critical trends in the hedge fund industry, particularly as more mutual fund families enter the marketplace with fund-of-funds and other low-minimum hedge fund products. This study explores the various types of hedge strategies and products currently offered in the institutional, foundation, endowment, and HNW arena, providing a comprehensive understanding of the industry. We include a detailed look at product development, risk management issues, and distribution opportunities, and offer an outlook for the hedge fund industry as it pertains to affluent and retail investors.

This new actionable study will guide you through this exploding market by:

- Illustrating product development strategies, including technical, operational and distribution tactics
- Evaluating hedge fund structures and legal entities, including '40 Act-registered hedge funds
- Analyzing the drivers of investor demand for hedge funds
- Identifying the hedge fund investor, definitions for wealth strata, and segmentation strategies for targeting the mass affluent investor

“FRC expects global hedge fund assets will reach \$1 Trillion by 2004, and nearly triple in size over the next four years.”

Source: FRC Research

For more information call: 888.491.9788

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Entering the World of Hedge Funds answers these critical questions and more!

- What specific steps should new entrants take in developing hedge products for “merely affluent” investors?
- What traps do new entrants need to be concerned about?
- How difficult is it for mutual fund firms to adapt their current technology and administrative infrastructures to hedge fund products?
- Will mutual fund firms be able to distribute hedge funds via their existing distribution channels?
- Who are the key players and what types of relationships are necessary for new entrants to develop and distribute new hedge products?
- How have regulations changed with respect to hedge funds?
- Will “registered hedge funds” be adopted by mass affluent investors?
- Will the entrance of well known mutual fund firms fundamentally change the hedge fund industry as we know it today?
- How can established hedge players defend their territory from the expected flood of new competition?
- How can established hedge players leverage their leadership position to move “down-market” without undermining their current business models?

More Information

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FRC Research Studies

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