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Hedge Fund Pitch Book | Marketing Materials

Posted: 11 Feb 2009 09:53 AM PST

Hedge Fund Pitch Book

Hedge Fund Marketing Materials Tips



Below is a list of my top 10 tips to those professionals who are looking to create a pitch book for their **hedge fund**. My advise to both \$30M and \$1M hedge funds is that you can never start this process early enough, it is an iterative constantly evolving project which will never be complete. Here are the top 10 tips for creating your hedge fund marketing materials.

1. Think long-term. Invest in creating a robust institutional quality pitch book the first time around and complete 5 drafts of it internally before showing it to a single investor.
2. Stress your team, investment process and risk management controls and how they all interact inside the operations of your hedge fund.
3. Make your competitive advantage clear and do not rely upon canned phrases such as "positive returns within bull or bear markets" anyone who reviews hedge fund materials for a living see these by the hour. Your advantage must be unique.
4. Stress the importance and individual functions of your team, your experiences and pedigree. This should be the foundation upon which everything else is built.
5. Do not send any pitchbook or marketing material out before speaking with a qualified compliance or legal counsel on your team.
6. Create a one page marketing sheet, full 13-20+ page PowerPoint presentation and one page newsletter which would be released monthly providing your view of the markets within your niche area of expertise.
7. Work with high caliber service providers so that you don't bring extra skepticism upon a relatively new fund which may already be scrutinized by potential investors and advisors.
8. Use your whole team and prime brokerage business partners and other service providers to improve your marketing materials. Professionals who work in prime brokerage or administration see many types of marketing materials and can help provide valuable feedback at no additional cost to your fund.
9. Do not create a PowerPoint presentation that is longer than 30 pages. There are some institutional money managers who run 3 similar funds and will sometimes cover each of these within a single presentation, but this is the exception. 95% of the people who you will send the PowerPoint presentation to will not read more than 15 pages of the material unless you are walking them through it over the phone or in person.
10. Purchase the rights to graphics, choose a unique, simple and professional layout for the presentation and use the new Windows Vista diagramming tools to create institutional quality presentation. Coming into a meeting with a word document or 25 pages of bullet points is not very effective. It is hard enough to catch an investors' attention and bring them to the table to discuss your fund, you don't want to lose them due to the aesthetics of your PowerPoint.

To view over 100 additional articles related to hedge fund marketing and sales please browse our Hedge Fund Marketing & Sales Library.

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Asian Hedge Fund Managers Hurt in 2008

Posted: 10 Feb 2009 03:22 PM PST

Asian Hedge Funds

Asian Hedge Fund Managers Hurt



Here is a short article excerpt I found on Asian-based hedge fund managers and how they lost more assets in 2008 than the rest of the industry. This is somewhat expected since they had a steep ramping up period before this crash. Connected to this I saw some statistics within the WSJ this morning about GDP growth in emerging countries. The article was talking about how these economies were seeing slower growth this year, the truth is that they are strong compared to ours. Here is the excerpt:

Asian hedge-fund assets fell 36 percent in 2008, shrinking more than the global average, as the biggest market declines since the Great Depression prompted performance losses and investor redemptions, according to Hedge Fund Research Inc.

Assets peaked at \$111 billion at the end of 2007 for hedge funds invested in Asia and stood at \$71 billion in the fourth quarter last year, according to the Chicago-based industry researcher. The global hedge-fund industry peaked at \$1.9 trillion in mid-2008.

The hedge-fund industry worldwide shrank by more than 20 percent to \$1.5 trillion at the end of last year, and averaged losses of about 19 percent, as measured by the HFRX Global Hedge Fund Index. The MSCI World Index, which tracks stocks in developed nations, tumbled a record 42 percent in 2008. **source**

Related to Asian Hedge Fund Managers Hurt in 2008

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