MERCURY

Private Markets and Alternative Investments

13 – 17 September 2027
Washington DC (USA)



Dubai - UAE: +971 4 450 5697
Istanbul - Türkiye: +90 539 599 1206
Amman - Jordan: +962 79 712 3347

Private Markets and Alternative Investments

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Introduction

This Private Markets and Alternative Investments course introduces the core landscape of unlisted assets and non-traditional investment strategies, with a strong focus on how they differ from public markets. It explains the structure, purpose, and operating logic of private equity, private credit, real assets, venture capital, and hedge funds. It develops understanding of risk, return, liquidity, valuation, and portfolio diversification in long-term investment decision-making. Participants will explore how institutional investors assess opportunities, manage constraints, and interpret fund performance across different private market strategies. The program builds a practical theoretical foundation for evaluating capital allocation, due diligence, and fund structures. The content reflects the major private market categories used in professional investment education and practice.

Targeted Groups

This Private Markets and Alternative Investments training targets professionals seeking knowledge and skills:

- Investment analysts in private markets.
- Portfolio managers handling diversified assets.
- Finance professionals in institutional investing.
- Wealth managers serving sophisticated clients.
- Due diligence and research teams.
- Risk and performance specialists.
- Banking and advisory professionals.
- Professionals entering private equity or private credit.
- Consultants working on asset allocation.
- Learners seeking alternative investment foundations.

Course Objectives

Participants will achieve the following objectives by completing the Private Markets and Alternative Investments course:

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- Understand private market structures and investment logic.
- Distinguish private equity, private credit, and real assets.
- Explain venture capital, hedge funds, and fund strategies.
- Assess liquidity, risk, and return characteristics clearly.
- Interpret fund terms, fees, and capital commitments.
- Support allocation decisions with sound theoretical analysis.
- Evaluate performance drivers and long-term value creation.
- Apply basic due diligence concepts to investment cases.

Targeted Competencies

Participants will gain the following competencies during the Private Markets and Alternative Investments program:

- Analytical understanding of alternative asset classes.
- Ability to compare public and private investment features.
- Skill in reading fund structures and investment terms.
- Competence in reviewing risk-return trade-offs.
- Confidence in discussing valuation and exit concepts.
- Awareness of diversification and portfolio construction principles.

Studying Scenarios

In this Private Markets and Alternative Investments training, participants develop skills through the following scenarios:

- A pension fund reviews private market allocation options.
- An investor compares private equity and private credit.
- A firm assesses a new infrastructure fund proposal.
- A team examines liquidity constraints and exit timing.

Course Content

Unit 1: Foundations of Private Markets

- Define private markets and alternative investments in a professional investment context.
- Compare listed and unlisted assets through access, transparency, and liquidity.
- Explain why investors use private markets for diversification and return enhancement.
- Review the main categories: private equity, private credit, real assets, and hedge funds.
- Distinguish institutional use cases from individual investor expectations.
- Identify the long-term capital nature of private market participation.
- Understand how market cycles influence allocation behavior and strategy selection.

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Unit 2: Private Equity and Venture Capital

- Explain private equity as an ownership-based investment strategy in non-public companies.
- Describe buyouts, growth capital, and venture capital in simple investment terms.
- Examine how managers seek operational improvement and value creation.
- Review the role of early-stage, expansion, and late-stage financing.
- Discuss investment horizons, holding periods, and exit pathways.
- Identify how co-investment and secondary transactions fit into the market.
- Analyze the balance between control, risk, and potential upside.

Unit 3: Private Credit and Debt Strategies

- Define private credit and its role in lending outside traditional bank channels.
- Compare direct lending, mezzanine finance, distressed debt, and special situations.
- Explain how borrowers and lenders structure deals in private financing.
- Review income generation, covenants, and downside protection features.
- Discuss credit selection, recovery expectations, and capital preservation themes.
- Understand how private debt responds to interest rate changes and market stress.
- Evaluate the use of private credit in income-oriented portfolio design.

Unit 4: Real Assets, Hedge Funds, and Portfolio Role

- Describe real assets as investments tied to tangible economic value.
- Cover real estate, infrastructure, and natural resources as core examples.
- Explain how cash flows, inflation sensitivity, and asset use drive returns.
- Introduce hedge funds as strategy-driven vehicles with flexible mandates.
- Compare long-short, market-neutral, event-driven, and relative-value ideas.
- Assess the role of alternatives in reducing correlation with public markets.
- Connect these assets to broader asset allocation and capital preservation goals.

Unit 5: Fund Structures, Due Diligence, and Performance Review

- Explain fund structures, commitments, capital calls, and distributions.
- Review limited partner and general partner responsibilities.
- Discuss fees, carried interest, and incentive alignment.
- Introduce due diligence topics such as managerial skills, strategic fit, and governance.
- Examine valuation issues, reporting practices, and performance interpretation.
- Compare return measures, cash flow patterns, and benchmark limitations.
- Evaluate investment decisions through risk management and portfolio fit.

Final Insights & Key Takeaways

Private markets and alternative investments require disciplined analysis due to long-term horizons, limited liquidity, and specialized selection processes. Understanding private equity, private credit, real assets, and hedge funds supports better allocation decisions and stronger investment evaluation.