

STAGE 6 · INSTITUTIONAL POSTURE

Mastery III — Institutional Elite

The capstone. Portfolio construction, alternative data, and the institutional-grade decision frameworks that separate operators from amateurs.

WHAT YOU WILL BE ABLE TO DO

- Construct multi-strategy portfolios with explicit factor exposures and risk constraints.
- Operate alternative-data integration responsibly (legal, ethical, statistical).
- Apply institutional decision frameworks (pre-mortems, red-team reviews, calibration audits).
- Build the personal operating manual that survives bad years and bad decades.
- Mentor and review the work of Stage 4–5 graduates as part of cohort progression.

FOR WHOM

Stage 5 graduates committed to long-horizon serious trading. Operators of small private capital. Anyone who has read every retail course on the market and knows what is missing.

CURRICULUM

- M1 — Multi-strategy portfolio construction
- M2 — Factor models and risk parity at small scale
- M3 — Alternative data: ethical, legal, statistical considerations
- M4 — Institutional decision frameworks: pre-mortems, red-teams
- M5 — Calibration: how to know how well you actually know things
- M6 — The personal operating manual: ten-year horizon

FORMAT

- Six video volumes plus a 180-page institutional reference book.
- Quarterly invitation-only cohort retreats (in-person and virtual).
- Mentorship of Stage 4–5 cohorts as part of progression.
- 1:1 staff sessions every quarter for the first year.
- Stage 6 capstone: a publishable-quality piece of original research.

■ 19,999

One-time. Lifetime access. Stage 5 p

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