

jetfin AGRO 2010

Agriculture is the bright light of today's investment universe.

The rapid rise in global demand for food is providing new opportunities for investors.

jetfin AGRO 2010 CONFERENCE is the only event for investors, which exclusively gathers top agricultural fund managers delivering strong returns in challenging markets.

Special focus: **Region specific investment opportunities.**

jetfin AGRO 2010 CONFERENCE is the ultimate meeting point for investors in search of sustainable and non-correlated returns when investing in agriculture.

Leading successful agriculture investment managers present and explain their investment strategies.

Institutional investors and wealth managers compare winning solutions, enabling them to take the right investment decisions in key markets such as farming, soft commodities or timber.

**Don't miss the unique opportunity to participate to the
jetfin AGRO 2010 CONFERENCE**

Confirmed Speakers

- ◆ **Peter-Erik Ywema**, General Manager, **Sustainable Agriculture Initiative**, Belgium
- ◆ **Nicolas Landolt**, Director, **Sandoz Family Office**, CH / Brazil
- ◆ **Giulio Franzinetti**, Managing Director, **ASDF BV**, Netherlands
- ◆ **John Coast Sullenger**, Fund Manager, **GAIA Capital**, CH
- ◆ **Olivier Baumgartner-Bezulgues**, Advisor, **Altarius Asset Management**, CH
- ◆ **Olivier Pairault**, Agriculture Portfolio Manager, **BlueGold Capital Management**, UK / CH
- ◆ **Paul Marland**, Partner, **LCI (Luxembourg) SA**, Luxembourg
- ◆ **Douglas King**, Founder, **Aisling Analytics**, CH / Singapore
- ◆ **Mari Kooi**, CEO, **Wolf International**, USA
- ◆ **Shawn Johansen**, Director, **Sustainable Equity Partners**, USA
- ◆ **Michel Tamisier**, Managing Partner, **Elite Advisers**, Luxembourg
- ◆ **Michael Whitehead**, Associate Director, **Macquarie Agricultural Funds Mgmt.**, Australia
- ◆ **Detlef Schoen**, Founder, **Aquila Capital Group**, Germany
- ◆ **Pedro Herrera**, Senior Vice President, **HSBC Securities**, USA
- ◆ **Olivier Combastet**, Founder, **Pergam Finance**, France / Uruguay
- ◆ **Gonzalo Fernandez Castro**, Founder, **Lumix Capital**, CH / Argentina
- ◆ **Jan Pensaert**, Founder, **Valiance Asset Management**, UK / Brazil
- ◆ **Stephen Kenney**, Vice President, **Hancock Agricultural Investment Group**, USA
- ◆ **Anton Khmel'nitski**, Founder, **Elbrus Capital Investments**, Ukraine
- ◆ **Charles Vilgrain**, CEO, **AgroGeneration**, France / Ukraine
- ◆ **Neil Crowder**, Co-Founding Partner, **Chayton Capital**, UK
- ◆ **Craig Tashjian**, Principal, **Amerra Capital Management LLC**, USA
- ◆ **Richard Davis**, Fund Manager, **BlackRock Investment Management**, UK
- ◆ **François Gilliéron**, Consultant, **Atlas Capital**, CH
- ◆ **Thomas Faure Romanelli**, Managing Partner, **Plus Capital**, UK

Why attend **jetfin** AGRO 2010 CONFERENCE?

Unique Event

jetfinAGRO 2010 CONFERENCE is the only event where institutional and private investors can meet with top Agro fund managers to learn and debate all issues surrounding agriculture investments.

Networking Opportunity

Networking Lunch:

Enjoy lunch among your peers with the chance to candidly discuss the concerns, challenges and opportunities of the coming months.

Networking Cocktail & Standing Buffet Dinner Reception:

We invite you to re-connect with your peers in a relaxed informal environment where you will meet influential investors, allocators and alternative investments managers.

jetfin Conferences Testimonials

'I very much appreciated the selection of fund managers present.'
Pierre Mirabaud, Partner, Banque Mirabaud, Switzerland

'I very much enjoyed last week's green conference. I thought the agenda was comprehensive and thoughtfully put together. I was impressed by the depth and variety of the speakers.'

Caroline S. Bentz, MD, Parker Global Strategies, USA

'Thank you very much for organizing such a brilliant event, which we found extremely useful. Our investors at the conference said it was one of the most productive conferences they've attended'.

Oksana Kuchura, Partner, UFG Asset Management, Russia

'It was a great pleasure to participate in the conference. It was one of the best conferences I have been so far. Very well organized and with good speakers and audience'.

Luis Ribeiro, Fund Manager, HSBC, Brazil

'The event is very important since it gives both a very broad overview and at the same time the latest news on some of the most interesting investment areas globally, and the set-up is pretty unique'.

Olle Olson, Director, East Capital, Sweden

Thursday June 10th, 2010 - Conference Program

08.00 Registration & Coffee

08.20 Chairman's Introductory Speech

Welcome and comments on the agenda

Pierre Lavaud, Jetfin, CH

08.40 The Macro Picture

- ◆ Macro Overview: agricultural sector
- ◆ Supply and demand
- ◆ Climate change & weather implication

Peter-Erik Ywema, SAI Platform, Belgium

09.00 Sustainability in Agriculture

- ◆ Fair Trade and Agriculture
- ◆ Labelling
- ◆ Sustainable Development and Agriculture

Nicolas Landolt, Sandoz Family Office, CH / Brazil

Giulio Franzinetti, ASDF BV, Netherlands

EXAMINING THE STRATEGIES

09.30 Agro Equity Strategies

- ◆ How to build an equity portfolio in the agro business
- ◆ Where are the opportunities in Global Emerging Markets?
- ◆ Volatility and risks

John Coast Sullenger, GAIA Capital, CH

10.00 Coffee Break

10.30 Soft Commodities

- ◆ Opportunities and risks in agricultural commodities
- ◆ Specificities of wheat, corn, soybeans, sugar markets. Managing price risk
- ◆ CTAs, speculation or positive contribution?

Moderator:

Olivier Baumgartner-Bezulgues, Altarius Asset Management, CH

Speakers presentations:

Olivier Pairault, BlueGold Capital Management, UK / CH

Paul Marland, LCI (Luxembourg) SA, Luxembourg

Douglas King, Aisling Analytics, CH / Singapore

11.20 Hedging Strategies

- ◆ Hedging contracts for agro-investments
- ◆ Counterparty, political and market risks

Mari Kooi, Wolf International, USA

11.50 Timber

- ◆ Timber as long term investments
- ◆ Forest investment opportunities

Shawn Johansen, Sustainable Equity Partners, USA

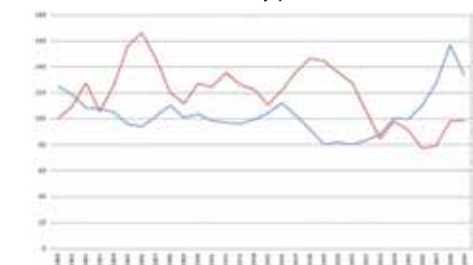
12.15 Wine

- ◆ Wine as an asset class

Michel Tamisier, Elite Advisers, Luxembourg

12.30 Networking Lunch

Food commodity prices since 1980



— IMF food price index (base 100 in 2005)

— Stock to use %

REGION SPECIFIC STRATEGIES

02.00 Australia & New Zealand

- ◆ Cattle investments in Australia
- ◆ Dairy in New Zealand

Michael Whitehead, Macquarie Agricultural Funds Management, Australia

Detlef Schoen, Aquila Capital Group, Germany

Grain stock to use



— Consumption (1000 MT)
— Production (1000 MT)
— Stock to use %

02.30 Latin America

- ◆ Farm opportunities in Uruguay and Argentina
- ◆ Brazil specificities in farmland industry

Moderator:

Pedro Herrera, HSBC Securities, USA

Speakers presentations:

Olivier Combastet, Pergam Finance, Uruguay

Gonzalo Fernandez Castro, Lumix Capital, CH / Argentina

Jan Pensaert, Valiance Asset Management, UK / Brazil

03.10 USA

- ◆ Agro Investment Landscape in the US
- Stephen Kenney**, Hancock Agricultural Investment Group, USA

03.30 Afternoon Tea Break

04.00 Ukraine

- ◆ Specificities of Land and Farm investments in Ukraine

Anton Khmelnitski, Elbrus Capital Investments, Ukraine

Charles Vilgrain, AgroGeneration, France / Ukraine

DJ Agriculture Index



04.40 Africa

- ◆ Farm investment opportunities in Africa
 - ◆ Political risk and investment implications
- Neil Crowder**, Chayton Capital, UK

DIVERSIFIED STRATEGIES

05.10 Agriculture Diversified Strategies

- ◆ Portfolio diversification in agro-investments
- ◆ Absolute return in agriculture

Craig Tashjian, Amerra Capital Management LLC, USA

Richard Davis, BlackRock Investment Management, UK

INVESTORS

05.50 Investors & Allocators

- ◆ The point of view of final investors (private bankers and HNWI's)
- ◆ Strategies when investing in farming
- ◆ Dedicated exposure or diversified portfolios?
- ◆ Creating the ideal farm and agro portfolio

François Gilliéron, Atlas Capital, CH

Thomas Faure Romanelli, Plus Capital, UK

06.20 Chairman's closing remarks

Pierre Lavaud, Jetfin, CH

EVENING EVENT

07.00 Networking Cocktail & Standing Buffet Dinner Reception

At the trendy "Riverside Café" in Geneva
Good food and Jazz Band
Ideal for networking in good atmosphere

RIVERSIDE
CAFÉ RESTAURANT & BAR

Rue du Rhône 19 - 1204 Geneva / Tel: +41 223113200

10.30 End

INSTITUTIONAL PARTNERS



EXHIBITOR



ORGANIZER



Member of



Registration form

Please fill in this form and fax it back to +41 22 839 8089
 or register by phone: +41 22 839 8080
 or post mail the form: Jetfin Events - 6, Route de Malagnou - 1208 Geneva, Switzerland
 You can also register online at: www.jetfin.com

jetfin AGRO 2010 CONFERENCE

Thursday June 10th, 2010 - Grand Hotel Kempinski - 19, Quai du Mont-Blanc - 1201 Geneva, Switzerland - Phone: +41 22 908 9081

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- FULL DAY Conference & Cocktail / Dinner Reception 1'700 CHF
- FULL DAY Conference & Cocktail / Dinner Reception Early Bird 2 (before May 12th): -10% 1'530 CHF
- Conference Only 1'500 CHF
- Cocktail / Dinner Reception Only 270 CHF

**Attractive additional discount for Investors, Allocators and Pension Funds.
 Please contact Jetfin for more details: +41 22 839 8080 - info@jetfin.com.**

VAT excluded (+7.6 %)

About the Organizer

jetfin AGRO 2010 CONFERENCE is a jetfin initiative, a leading fund adviser and investment conference organizer.

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Extra Details

Hotel accommodation: the official hotel for speakers, sponsors and delegates is the Grand Hotel Kempinski. Delegates staying at Grand Hotel Kempinski are entitled to a special rate.

To book: please call +41 22 908 90 81 and mention that you are attending a Jetfin conference. For other hotels with negotiated rates please contact Jetfin.

Special rates: for group booking or for multi Jetfin conferences, please do not hesitate to contact us directly.

Invoice: will be sent after registration.

Payment: must be received before Event's date to guarantee admission.

Substitution: a substitute delegate is welcome at no extra charge. Alternatively, your registration can be credited to a future Jetfin Event conference.

Cancellation within **one week** prior to the event, **no refund** can be made - **Cancellation** within **two weeks** prior to the event, 50% refund (minus CC transaction fees if applicable) - **Cancellation two weeks and more** to the event, then **total refund** (minus CC transaction fees if applicable).

Jetfin Conference Programs can undergo circumstantial changes with no prior notice.

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