

All About **Investment Strategies** in **Soft Commodities, AG, Farming, Timber**

Special focus: Region specific investment opportunities

WHERE INVESTORS MEET WITH THE BEST PERFORMING
FUND MANAGERS IN AGRICULTURE

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 2011 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 2011 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 make 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 2011 conferences

GENEVA

TUESDAY JUNE 7th
Grand Hotel Kempinski [Geneva, Switzerland]

ZURICH

THURSDAY JUNE 9th
The Dolder Grand Hotel [Zurich, Switzerland]

SPEAKERS

- ◆ **Geoff Burke**, Partner, **Agro-Ecological Investment Management**, UK
- ◆ **Catherine Henry**, Product Specialist, **SAM Sustainable Asset Mgmt**, CH
- ◆ **John Coast Sullenger**, MD & Portfolio Manager, **GAIA Capital**, CH
- ◆ **Desmond Sheehy**, CIO, **Duxton Asset Management Pte Ltd**, Singapore
- ◆ **Nabil Marc Abdul-Massih**, Managing Partner, **Inoks Capital**, Switzerland
- ◆ **Mark Zenuk**, Managing Director, **NGP Global Adaptation Partners**, USA
- ◆ **Myret Zaki**, Vice-Editor in Chief, **Bilan**, CH
- ◆ **Bernard Belk**, Director Global Agro, **Swiss Re Corporate Solutions**, CH
- ◆ **Detlef Schoen**, CEO, **Aquila Partners**, Germany / New Zealand
- ◆ **Rajesh Srivastava**, Chairman & MD, **Rabo Equity Advisors**, India
- ◆ **Deepak Lalwani OBE**, Founder, **LalCap**, UK
- ◆ **Olivier Combastet**, Founder, **Pergam Finance**, France / Uruguay
- ◆ **Alberto San Miguel**, Partner, **Optimum Advisors**, Argentina / USA
- ◆ **Charles Vilgrain**, CEO, **AgroGeneration**, France
- ◆ **Magnus Weikert**, Director, **The International Woodland Company A/S**, Denmark
- ◆ **Judson Hill**, Managing Director, **NGP Global Adaptation Partners**, USA
- ◆ **Francois Marchal**, Partner, **FM Advisors**, CH
- ◆ **Philippe Szokoloczy-Syllaba**, Founder, **My Global Advisor**, CH
- ◆ **Catherine Guyonvarc'h**, Wealth Manager, **GPM SA**, CH
- ◆ **Nicolas Compard**, Portfolio Manager Real Assets, **CERN Pension Fund**, CH

And more to come...

Why attend jetfin AGRO 2011 conferences?

Unique Event

jetfin AGRO 2011 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

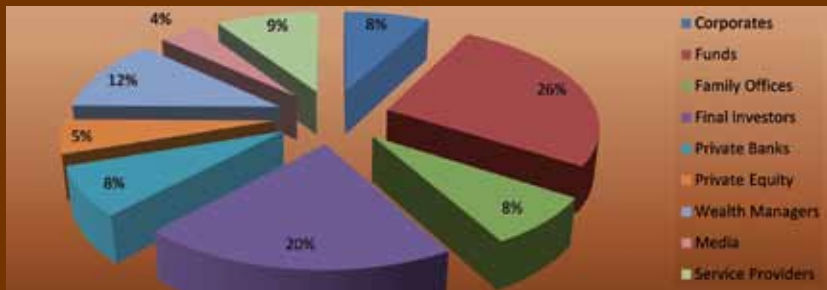
Networking Lunch:

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 Agro 2010 Attendees Profile



Pre-Conference Evening Party in Geneva June 6th at Geneva Polo Club

jetfin AGRO 2011 conference Geneva and GAIA Capital invite you to an evening of Polo and Argentine BBQ at the Geneva Polo Club

Time: 6pm-10pm

Location: Geneva Polo Club



Join colleagues and Agro 2011 participants for a networking event featuring an exciting exhibition polo match accompanied by open bar and traditional Argentine Asado BBQ.

Agenda for Tuesday June 7th and Thursday June 9th; 2011

08.00 | Registration & Coffee

08.20 | Chairman's Introductory Speech

Welcome and comments on the agenda

Pierre Lavaud, Jetfin, CH

08.30 | The Macro Picture

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

09.00 | Sustainability in Agriculture

- ◆ Sustainable development and agriculture
- ◆ Sustainable agribusiness

Geoff Burke, Agro-Ecological Investment Management, UK

Catherine Henry, SAM Sustainable Asset Mgmt, CH

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 | Agriculture Diversified Strategies

- ◆ Portfolio diversification in agro-investments
 - ◆ Absolute return in agriculture
 - ◆ Global agricultural investing
- Desmond Sheehy**, Duxton Asset Management Pte Ltd, Singapore
- ◆ Crop Financing: is it different in LatAm (Brazil), Eastern Europe (Ukraine) and West Africa (Burkina Faso)?
- Nabil Marc Abdul-Massih**, Inoks Capital, CH
- ◆ Global Ag Opportunities
- Mark Zenuk**, NGP Partners, USA

Moderator: Myret Zaki, Bilan, CH

11.20 | Soft Commodities

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

12.10 | Hedging Strategies

- ◆ Hedging contracts for agro-investments
 - ◆ Counterparty, political and market risks
- Bernard Belk**, Swiss Re Corporate Solutions, CH



12.30 | Networking Lunch

REGION SPECIFIC STRATEGIES

01.30 | Australia & New Zealand

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

Detlef Schoen, Aquila Partners, Germany / New Zealand

02.00 | India

- ◆ India agriculture investment strategies
- Rajesh Srivastava**, Rabo Equity Advisors, India
- Moderator: Deepak Lalwani OBE**, LaCap, UK

02.30 | Latin America

- ◆ Farm opportunities in Uruguay and Argentina
 - ◆ Brazil specificities in farmland industry
- Olivier Combastet**, Pergam Finance, France / Uruguay

03.00 | USA & Canada

- ◆ Agro investment landscape in the US
- Alberto San Miguel**, Optimum Advisors, Argentina / USA



03.30 | Ukraine & Russia

- ◆ Specificities of land and farm investments in Ukraine & Russia
- Charles Vilgrain**, AgroGeneration, France / Ukraine (GVA only)

04.00 | Afternoon Tea Break



THEME SPECIFIC

04.30 | Timber

- ◆ Timber investment strategies
- Magnus Weikert**, The International Woodland Company A/S, Denmark

05.00 | Water

- ◆ Water as an investment proposal
- Judson Hill**, NGP Partners, USA

INVESTORS

05.30 | 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
- Francois Marchal**, FM Advisors, CH
- Philippe Szokoloczy-Syllaba**, My Global Advisor, CH
- Catherine Guyonvarc'h**, GPM SA, CH (GVA Only)

06.10 | Pension Funds

- ◆ Pension fund perspectives for investments in soft commodities and agriculture
 - ◆ Sustainability and pension criteria for Ag investments
- Nicolas Compard**, CERN Pension Fund, CH

06.30 | Chairman's closing remarks

Pierre Lavaud, Jetfin, CH

* Speaker to be confirmed

GENEVA EVENING EVENT
TUESDAY, JUNE 7TH

07.00 | Networking evening party

At the trendy "Riverside Café" in Geneva
Good food and Jazz Band
Ideal for networking in a relaxed atmosphere
Rue du Rhône 19 - 1204 Geneva / Tel: +41 223113200

RIVERSIDE
CAFÉ RESTAURANT & BAR

ZURICH EVENING EVENT
THURSDAY, JUNE 9TH

07.00 | Networking evening party

At the Dolder Grand Hotel.
Ideal for networking in a good atmosphere

09.00 | End

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EXHIBITOR



ORGANIZER



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

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AGRO 2011

conferences

TUESDAY JUNE 7th

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

THURSDAY JUNE 9th

The Dolder Grand - Kurhausstrasse 65
8032 Zurich, Switzerland - Phone: +41 44 456 60 00

Delegate Details

Name..... Surname.....
Position..... Company.....
Nature of Company Business.....
Phone..... Fax.....
E-mail.....
Postal Address.....
City..... Zip Code..... Country.....

Please register me for (please tick) - fax back to: +41 22 839 8089

Early Bird - Register before May 7th

- | | |
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Registration after May 7th

- | | |
|---|-----------|
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To receive your «Promotional Code» for registration please contact Jetfin.

Promotional code.....

About the Organizer

jetfin AGRO 2011 conference is a JetFin initiative, a leading fund adviser and investment conference organizer.

Phone: +41 22 839 8080 | Fax: +41 22 839 8089 | Website: www.jetfin.com | E-mail: jetfin@jetfin.com

Post mail: Jetfin Events - 6, Rue de Malagnou - 1208 Geneva, Switzerland

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Extra Details

Hotel accommodation for Geneva conference: 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.

How to book for Geneva conference: please call +41 22 908 9081 and mention that you are attending a Jetfin conference. For other hotels with negotiated rates please contact Jetfin.

Hotel accommodation for Zurich Conference: the official hotel for speakers, sponsors and delegates is Dolder Waldhaus Hotel located 5 min walk from Dolder Grand Hotel.

To book at Dolder Waldhaus: please call +41 44 269 1000 or use the booking form accessible on Jetfin website.

To book at Dolder Grand Hotel: please call +41 44 456 6000 and mention that you are attending a Jetfin conference.

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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