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By Rudy Ruitenberg - June 10

Jan Pensaert, the founder of Valiance Asset Management, said the London-based fund plans to focus its investments in Brazilian farming in the Mapito region of Maranhao, Piaui and Tocantins because that area has the most potential to upgrade its transport system. Pensaert made the comments at the Jetfin Agro industry conference in Geneva today.

In Brazil, “there is a lot of land available, particularly in Mato Grosso, and also Mapito. You do have some challenges in transportation.”

“We want to focus particularly on Mapito. That’s the region with the most infrastructures upside. The climate is good, the topography is good. You’re next to the rain forest so there is a lot of cloud formation, precipitation.”

“We have a clear title, as a foreigner we have no restrictions” on land ownership. “You can find very large scale farms.”

Agriculture has “very low correlation with the S&P 500, so it’s a very good diversifier.”