Louis Roederer and Dom Pérignon, Magnum Portfolio, 2008

- Average **annual appreciation** of almost **18 %** for the 2008 vintage of **Dom Pérignon** over the **last 5 years.**
- Average **annual appreciation** of almost **24 %** for the 2008 vintage of **Louis Roederer** over the **last 5 years.**
- The 2008 vintage of Louis Roederer received **98 points** from **Parker** and Dom Pérignon **95 points.**

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Factsheet - General

Origin	France
Region	Champagne
Type	Sparkling Wine
Grape	Champagne Blend (DP), Chardonnay and Pinot Noir (LR)
Vintage	2008
Quantity	30 bottles (DP) and 15 bottles (LR)
Bottle Size	1,500 ml
Rating	Robert Parker 95 (DP), 98 (LR)
Price per Bottle (excl. external costs and platformfees)	600 € each (DP), 1,150 € each (LR)
Investment Horizon	7 to 9 years
Value per Splint	50 €
Asset ID	4f56ec45-3acd-4567-b789-2802a4fa3817

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Cost Analysis

	Value in €
Asset Value	35,250 €
Platform Fee Splint Invest	2,850 €
External Maintenance Cost	4,350 €
Price	**42,450 €**
Number of Splints	849
Price per Splint	**50 €**

- The price of 42,450 € includes the Splint Invest platform fee and external maintenance costs of 7,200 €. 35,250 € can be allocated to the bottles.
- Splint Invest will charge an exit fee of 2 % applied to the proceeds from the sale of the asset.
- Each Splint holder bears a proportional part of the costs.

Rating

8/10

Return

The **2008** vintage from Dom Pérignon has achieved an **average annual increase** in value of **almost 18 % over the last 5 years**. For the same vintage of Louis Roederer, it is **even 6 % more**.

The **Champagne 50 Index by Liv-Ex** has **increased in value by 109 % over the last 5 years**. This underlines the appreciation of Champagne in general.

9/10

Stability

Both producers place a high value on quality. The **2008** vintage is one of the best in recent years. Magnum bottles in particular are in great demand and have high price stability.

The production volume of Louis Roederer amounts to **400,000** bottles per year. Dom Pérignon produces **2 million** bottles.

8/10

Track Record

Dom Pérignon is a famous, if not the most famous, champagne brand. Its origins go back to the abbey of Saint Pierre d'Hautvillers.

The Louis Roederer champagne house was founded in 1776 and belongs to a small circle of producers that are still family-run today.

The sparkling wines of Dom Pérignon and Louis Roederer are an integral part of the **Liv-Ex Champagne 50 Index**.

Investment Horizon of 7 to 9 Years – Splint Value 50€

Forecast per Splint in €	7 years	8 years	9 years
Ambitious	165	204	252
Balanced	139	168	202
Defensiv	66	71	77

- Investment horizon has been set to 7 to 9 years.
- Unlike other vintage champagnes, both Dom Pérignon and Louis Roederer are consumed continuously, bringing a premature shortage. The quality from the 2008 vintage is outstanding and therefore, we expect a higher price increase over a longer holding period.
- If one of the following two conditions is met, the sale of the asset is considered:
  - End of the defined investment horizon has been reached.
  - Ambitious case already occurs before the end investment horizon.

Your Return Potential

	Value in € defensive	Value in € balanced	Value in € ambitious
Expected gross sales proceeds at maximum maturity	65,373 €	171,498 €	213,948 €
- Splint selling fees of 2%	-1,307 €	-3,430 €	-4,279 €
- External maintenance cost over investment horizon	-4,350 €	-4,350 €	-4,350 €
- Splint Invest platform fee	-2,850 €	-2,850 €	-2,850 €
- Asset value at acquisition	-35,250 €	-35,250 €	-35,250 €
Expected return at maximum maturity	**21,616 €**	**125,618 €**	**167,219 €**
Average annual rate of return	**4.7%**	**16.5%**	**19.4%**

Why you should invest

- Annual 18% over the last 5 years for Dom Pérignon.
- 24% annually over the last 5 years for Louis Roederer.
- 98 Parker points for Louis Roederer and 95 for Dom Pérignon.

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The forecasted estimates are based on past performance data. Please remember that past performance may not be indicative of future results. Different types of investments involve varying degrees of risk, and there can be no assurance that the future performance of any specific investment, or product made reference to directly or indirectly in this factsheet, will be profitable, equal any corresponding indicated performance level, or be suitable for your portfolio. Due to various factors, including changing market conditions, the content may no longer be reflective of current opinions or positions.

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