EXITED INVESTMENT

Scotch Whisky - Jura 2013

RELEASE PRICE

€13,650

€50 per Splint

HOLD PERIOD

2.2 years

EXIT PRICE after FEES

€16,874

€61.8 per Splint

REALISED GAINS

+23.6%

10.0% annualised performance

The final Splint price after exit fees, stands at a solid €61.8. This translates to a net realised return of 23.6% within 2.2 years.

Rationale for exiting the investment opportunity:

🚀 This investment opportunity was exited in September 2024 after 2.2 years, realising a net gain of 23.6%, which translates to an annualised net gain of 10.1%.

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EXIT Calculation

	Nr. of Casks	Sale price per cask after commission	Total value
Jura 2013	1	16,720 €	16,720 €
Asset Sale Price			**16,720 €**
Final external costs adjustment	(2,2 years of 9 years investment horizon)		500 €
Exit fee of 2%			-344 €
Distributed Amount			**16,876 €**
Asset issue price			-13,650 €
Net earnings			**3,226 €**
Final Splint price			**61.81 €**
Realised profit per Splint			**11.81 €**
Realised earnings			**23.6%**
Realised earnings annualised			**10.1%**
Performance Gold in % annualised			4.4%
Performance SMI in % annualised			14.0%

Explanation on the short holding period:

This investment opportunity was launched in July 2022.🥃

The goal was to capitalise on the growth potential of renowned whisky brands. This cask comes from the famous Jura Distillery. Jura has established a reputation among enthusiasts with its wide range of single malt creations: In the past ten years alone, Jura single malt sales have soared by an impressive 150%. We aimed to benefit from this trend and decided to invest in this cask at that time.

The original investment horizon was set for 7 to 9 years. The whisky was already 9 years old when the investment was launched. The ambitious investment scenario projected an annual value increase of 9.9%, and over the last 2.2 years, the whisky returned 10.1% per year, surpassing the target value. In collaboration with our experts at Braeburn Whisky, we decided to capitalise on these gains and sell the asset to a new, fortunate owner.

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Naturally, any originally incurred maintenance costs💶 that were not used have been returned to the investors of this opportunity.

As you know, transparency 🔎 is important to us, so you will find the sale confirmation among the documents for this investment opportunity.

How does this appreciation compare to the traditional market?

This investment opportunity boasts a remarkable realised gain of 23.6%, after accounting for fees, resulting in an impressive annualised return of 10.1%.

During the same period, the SMI saw an increase of 10.2% (4.4% annualised), while gold increased by 34.4% (14.0% annualised).

This sold investment opportunity highlights the potential of alternative investments. During a turbulent time, this investment proved to be extremely stable, nearly matching the excellent performance of gold and outperforming the SMI.

Our trusted expert for this investment opportunity

BRAEBURN WHISKY