Lego, Ultimate Star Wars Helmet Collection

- Production is expected to be **discontinued** in **mid to end 2024**, and the estimated value after **discontinuation is +80%.**
- LEGO **Star Wars theme sets** have shown an **average annual appreciation of over 8%** over the past **5 years.**
- This investment has a **return potential of +54.8%** over **5 years** and is associated with **approximately 6.8% related costs.**

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Factsheet - General

Set number	75276 / 75277 / 75304 / 75305 / 75343 / 75328 / 75327 / 75349 / 75350 / 75351 / 75274
Name	Stormtrooper Helmet / Boba Fett Helmet / Darth Vader Helmet / Scout Trooper Helmet / Dark Trooper Helmet / Mandalorianer Helmet / Luke Skywalker Red Five / Captain Rex Helmet / Clone Commander Cody Helmet / Princess Leia Helmet / TIE Fighter Pilot Helmet
Theme	Star Wars
Subtheme	Helmet collection
Released	2020 - 2023
Pieces per set	647 / 625 / 834 / 471 / 693 / 584 / 675 / 854 / 766 / 670 / 724
Box condition	New
Number of sets	20 / 20 / 20 / 20 / 20 / 20 / 20 / 20 / 20 / 20 /10
Price per set	€: 180.40 / 92.80 / 64.95 / 73.20 / 86.60 / 55.65 / 54.60 / 60.80 / 60.80 / 78.35 / 391.75
Investment Horizon	3 to 5 years
Asset ID	1b856bba-a118-453e-bb65-ef97e15f3464

Cost Analysis

	Value in €
Asset Value	18,150 €
Platform Fee Splint Invest	400 €
External Maintenance Cost	250 €
Price	**18,800 €**
Number of Splints	376
Price per Splint	**50 €**

- The price of 18,800 € includes the Splint Invest platform fee and external maintenance costs of 650 €. 18,150 € can be allocated to the Lego sets.
- 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.

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Rating

Return

LEGO Star Wars theme sets have shown an **average annual appreciation** of over **8% over the past 5 years.**

It is expected that the sets will increase in **value by up to 80%** after production is discontinued.

Stability

The Lego chain index shows a **low positive correlation to the S&P 500 index** of just **0.13 points** and therefore brings stability to a portfolio.

The price of a set can decline if Lego decides to relaunch the product in form of a newer version.

Track Record

Firstly, Lego sets have proven to be a stable investment over time, with many sets appreciating in value significantly. This is due to various factors, such as limited edition sets, popular themes, and the rarity of certain pieces.

The **average annual increase** in value of the Lego sets over the last 30 years is at **11.1%.**

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Investment Horizon of 3 to 5 Years

Forecast per Splint in €	3 years	4 years	5 years
Ambitious	80	95	112
Balanced	64	71	78
Defensiv	53	54	55

- Investment horizon has been set to 3 to 5 years.
- The investment horizon has been set as short to medium-term. It is expected that the sets will be discontinued in 2024. Consequently, the price per set is expected to increase in the double-digit range. The affordable purchase price per set and low storage costs allow for a shorter investment horizon to be established.
- 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.

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Your Return Potential

	Value in € defensive	Value in € balanced	Value in € ambitious
Expected gross sales proceeds at maximum maturity	20,680 €	29,328 €	42,112 €
- Splint selling fees of 2%	-414 €	-587 €	-842 €
- External maintenance cost	-250 €	-250 €	-250 €
- Splint Invest platform fee	-400 €	-400 €	-400 €
- Asset value at acquisition	-18,150 €	-18,150 €	-18,150 €
Expected return at maximum maturity	**1,466 €**	**9,941 €**	**22,470 €**
Average annual rate of return	**1.6%**	**9.1%**	**17.5%**

Details to weighted calculation of the average annual rate of return:	Defensive Scenario	Balanced Scenario	Ambitious Scenario
Base value 1 with a 80% weighting	12 month inflation rate Switzerland (3.4%)	Average annual appreciation of Lego sets over the last 30 years. (bloomberg.com) (+11.1%)	Expected set price increase when production will be stopped in 2023 (Goldstein.Shop) (+21.6%)
Base value 2 with a 20% weighting		Annual price increase of the Lego Ideas Series (brickeconomy.com) (+5.2%)	Annual price increase of the Lego Ideas Series (brickeconomy.com) (+5.2%)

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Why you should invest

- Price expected to move up close to 80% after the production retirement later in 2024.
- Low correlation of 0.13 to the stock market
- Return potential of **+54.8%** over **5 years** with costs of around **6.8%**.

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