

Bordeaux Royalty Collection

Return Potential

An investment of 500 EUR is projected to be worth approximately 960 EUR in 9 years.

Cost-to-Return Ratio

With just 3.4% annual total costs (including exit fees), your net profit could be an impressive 9.8% per year.

Buy the Dip

The Bordeaux market saw a pullback last year (The Bordeaux 500 was -13.8% in 2023) and there is now excellent value to be found in the top names in the region especially as prices start to level out, and increase for some wines.



Fun facts:

This collection is 12% below market value and features iconic Bordeaux brands, entering or within their drinking windows, for which there is no substitute.

General Info

Name	Chateau Lafite Rothschild / Petrus / Chateau Angelus / Chateau Canon / Chateau Cheval Blanc / Chateau Figeac / Chateau Latour / Chateau Leoville Las Cases / Chateau Pichon Baron / Ducru-Beaucaillou / Le Pin / Chateau La Mission Haut-Brion
Year	2015 / 2018 / 2015 / 2021 / 2020 / 2015 / 2016 / 2016 / 2005 / 2020 / 2009 / 2005 / 2018 / 2007 / 2020
Origin	France
Region	Bordeaux
Type	Red Wine / White Wine
Grape	Predominantly: Cabernet-Sauvignon, Merlot, Cabernet Franc / To a lesser extent: Melbec, Petit Verdot / Together, these are known as "The Five Noble Grapes of Bordeaux".
Bottle size	750 / 750 / 1500 / 750 / 750 / 750 / 750 / 750 / 750 / 750 / 750 / 750 / 1500 / 750
Quantity	12 / 2 / 3 / 12 / 6 / 6 / 12 / 6 / 6 / 12 / 12 / 24 / 3 / 1 / 6
Rating	96+ / 100 / 97 / 94-96+ / 100 / 100 / 97+ / 99 / 98+ / 97+ / 96 / 97 / 97-99 / 93 / 94+
Price	EUR: 583 / 3942 / 593 / 222 / 135 / 625 / 183 / 632 / 692 / 179 / 168 / 182 / 2668 / 7114 / 445
Asset ID	d5111d6c-c55a-4062-92ae-ob138e0a126d

Cost Analysis

	Value in €
Asset Value	60,350 €
Platform Fee Splint Invest	4,550 €
External Maintenance Cost	3,050 €
Price	67,950 €
Number of Splints	1,359
Price per Splint	50 €

- The price of 67,950 € includes the Splint Invest platform fee and external maintenance costs of 7,600 €. 60,350 € can be allocated to the asset.
- 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

Return

Bordeaux typically achieves ~8% net returns on an annualized basis.

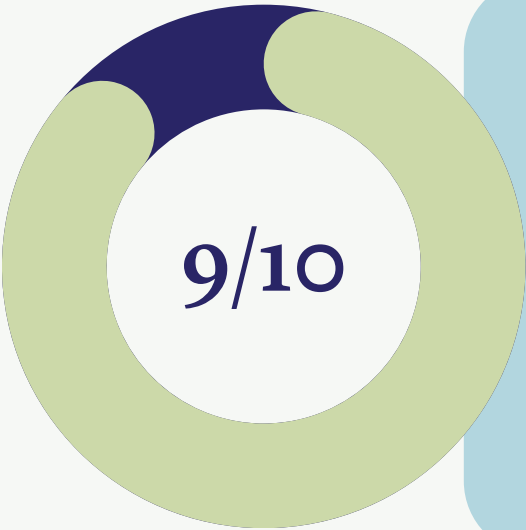
However, given the suppressed prices in the wine markets, the WineFi investment committee now believes Bordeaux to represent deep value. In fact, it is their “top region” for 2024.



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Stability

In 2023, the Bordeaux markets fell nearly 14%. As a result, this region represents exceptional value to investors looking to enter the wine markets. The Champagne in this collection are highly sought after by collectors, and represent exceptional value in a soft market.

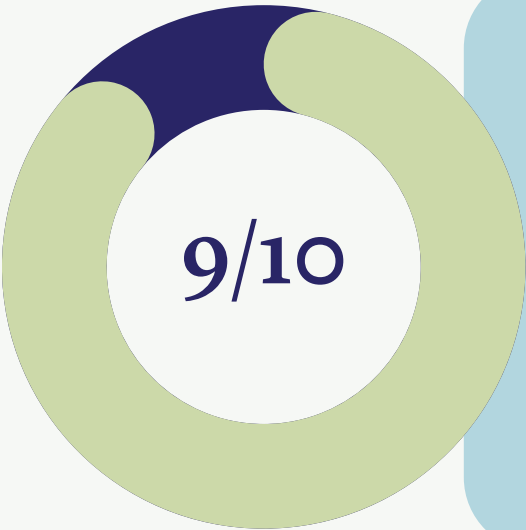


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Track Record

Bordeaux is the most prestigious wine region in existence. Until relatively recently, it was the only region considered truly ‘investment-grade’.

Whilst the wine market has expanded dramatically in the last thirty years, Bordeaux still makes up ~40% of secondary market trading volumes, meaning it should always form the cornerstone of any wine portfolio.



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Investment Horizon of 5-7 years

Forecast per Splint in €	5 years	6 years	7 years
Ambitious	86	100	116
Balanced	76	87	98
Defensive	55	56	57

The investment horizon has been set to 5 to 7 years.

- Unlike other wines, this collection is continuously consumed, which leads to an early scarcity. The established long-term investment horizon allows for benefiting from future scarcity.
- 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	77,463 €	133,182 €	157,644 €
- Splint selling fees of 2%	-1,549 €	-2,664 €	-3,153 €
- External maintenance cost over investment horizon	-3,050 €	-3,050 €	-3,050 €
- Splint Invest platform fee	-4,550 €	-4,550 €	-4,550 €
- Asset value at acquisition	-60,350 €	-60,350 €	-60,350 €
Expected return at maximum maturity	7,964 €	62,568 €	86,541 €
Average annual rate of return	1.4%	9.8%	12.4%

Details to weighted calculation of the average annual rate of return:	Defensive Scenario	Balanced Scenario	Ambitious Scenario
Base value 1 with a 90% weighting	12 month inflation rate Switzerland (1.4 %)	Annualised average return of portfolio over the last 5 years (liv-ex) (+15%)	Annualised average return of best performing bottle of portfolio over the last 5 years (liv-ex) (+18%)
Base value 2 with a 10% weighting		5-month return of the Acker Lafite Rothschild index (+1.3%)	5-month return of the Acker Lafite Rothschild index (+1.3%)

Why you should invest

1. Bordeaux typically achieves ~8% net returns on an annualized basis.
2. Excellent ratings.
3. Iconic Bordeaux brands featured in this collection.

Contact Information:



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