

Bordeaux Special Bundle (55 bottles)

This portfolio presents an ideal entry point, enabling investors to capitalize on the anticipated Bordeaux market rebound and long-term value growth.



winefi



9,1%
Net ROI p.a.

5 - 7
Years



Low
Risk

3 Reasons to Invest

- 1. Return Potential** 📈: An investment of 500 EUR is projected to be worth approximately 917 EUR in 7 years.
- 2. Cost-to-Return Ratio** ⚖️: After deducting 2.4% in annual total costs (including exit fees), your net return could reach 9.1% per year.
- 3. Renewed Interest from Asian Markets** 🍷: Recent stimulus measures are likely to increase demand in Asian markets. Historically, Bordeaux has been the most popular wine in this region, particularly the most prestigious producers. We recently saw one of the most successful auctions in recent times take place in Hong Kong, with mature Petrus being one of the key lots.

Asset Details

Details	Information
Name	Château Cheval Blanc, Château Mouton Rothschild, Duclot, Vieux Château Certan, Château Latour, Château Montrose, Château Mouton Rothschild, Le Dome
Year	2015 / 2005 / 2015 / 2022 / 2010 / 2022 / 2021 / 2015
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	750ml each
Quantity	6 / 12 / 9 / 6 / 4 / 6 / 6 / 6
Rating	100 / 98 / NA / 97-99 / 100 / 99-100 / 94 / 98
Price	per bottle in EUR: 620 / 522 / 928 / 293 / 1059 / 162 / 422 / 125
Asset ID	1ec293f2-3142-44b9-9cdb-e34772cf2c5f
Total asset value in EUR	32,200
Purchase price in EUR	28,600
Platform fee in EUR	2,150
Storage and insurance in EUR	1,450

Number of Splints	644

Investment Case

Valuation Summary 📝 To ensure the competitiveness of the investment, we conducted a thorough verification of the purchase price by analyzing the prices on the wine exchange Liv-Ex and the lowest bond prices on Wine-Searcher. Our analysis confirmed that the price offered, inclusive of all associated fees, is highly competitive as the price is 3% below the current Liv-Ex price. To estimate the potential ROI, we used the average annual price increase of the comparable vintages, the current price spreads, and the expected recovery rate of the Bordeaux market over the next years. For our conservative scenario, we assumed the value of the wine would grow at the rate of Swiss inflation, reflecting a defensive approach. In the balanced scenario, we used the average price increase over the last 10 years, factored in the price discount, and accounted for a 30% probability of the Bordeaux market making up the 1-year loss within the next two years. Finally, in the ambitious scenario, we used the average price increase over the last 10 years, factored in the price discount, and accounted for a 100% probability of the Bordeaux market making up the 1-year loss within the next two years.

Exit Options at Maturity 📅 We will manage the exit strategy on behalf of our investors, ensuring the best possible outcome based on market conditions at the time. Depending on the prevailing market situation, the bottles will be sold to private collectors or offered as single lots at a wine auction. An auction is considered if the price has developed to the point where the minimum bid matches the market value and there is high demand for these bottles. Both options are carefully considered, and we will choose the one that maximizes the return for our investors.

Why Invest in This Category? 🍷 Rare wine has fascinated investors for centuries. Lifelong experience in this field is of great importance. Investing in wine is very complex, but done right, it can prove to be a very lucrative business. Over the past three decades, fine wine has demonstrated itself to be one of the top-performing assets, achieving a remarkable compound annual growth rate of 10%.

Why Invest in This Asset? 💎 Investing in a Bordeaux wine portfolio offers a strategic

entry point into the fine wine market, leveraging both historical strength and market dynamics. Bordeaux wines have consistently outperformed the broader wine market, with selective label and vintage analysis showing returns up to 4% above market averages, and historical gains of 6% specifically within Bordeaux. This portfolio's inclusion of wines rated 100/100 by renowned critic Robert Parker underscores a focus on quality, prestige, and high market demand. Such wines carry cultural significance and enjoy fervent collector interest, enhancing their long-term value. Bordeaux accounts for 40% of the fine wine secondary market, ensuring robust liquidity, making it an attractive option for investors seeking flexibility. Key wines, like the 12x75cl case of 2005 Mouton Rothschild, represent not only a distinguished producer but a landmark vintage, boosting brand equity. The portfolio has been sourced below current market value, offering built-in upside potential as Bordeaux prices rebound. Additionally, renewed interest from Asian markets, spurred by recent economic measures, is expected to drive demand further. Notably, Bordeaux enjoys a historic connection to Asian collectors, as seen in record-breaking auctions in Hong Kong, solidifying its enduring appeal. Collectively, this portfolio captures Bordeaux's liquidity, prestige, and market-leading potential, making it a compelling investment for wine collectors and portfolio diversifiers.

Context in Time 🕒 Timing is critical when investing in Bordeaux wine, as market dynamics are influenced by economic cycles, consumer trends, and global events. Currently, a contraction in Bordeaux prices offers a unique opportunity to acquire high-value assets at a discount, positioning investors for upside potential as the market rebounds. Renewed demand from Asian markets, combined with shifting investor preferences for tangible, alternative assets amid economic uncertainty, highlights the strategic advantage of entering now. Historical performance demonstrates Bordeaux's resilience and enduring appeal, making this timing ideal for capitalizing on a blend of discounted valuations, market liquidity, and revived international interest.

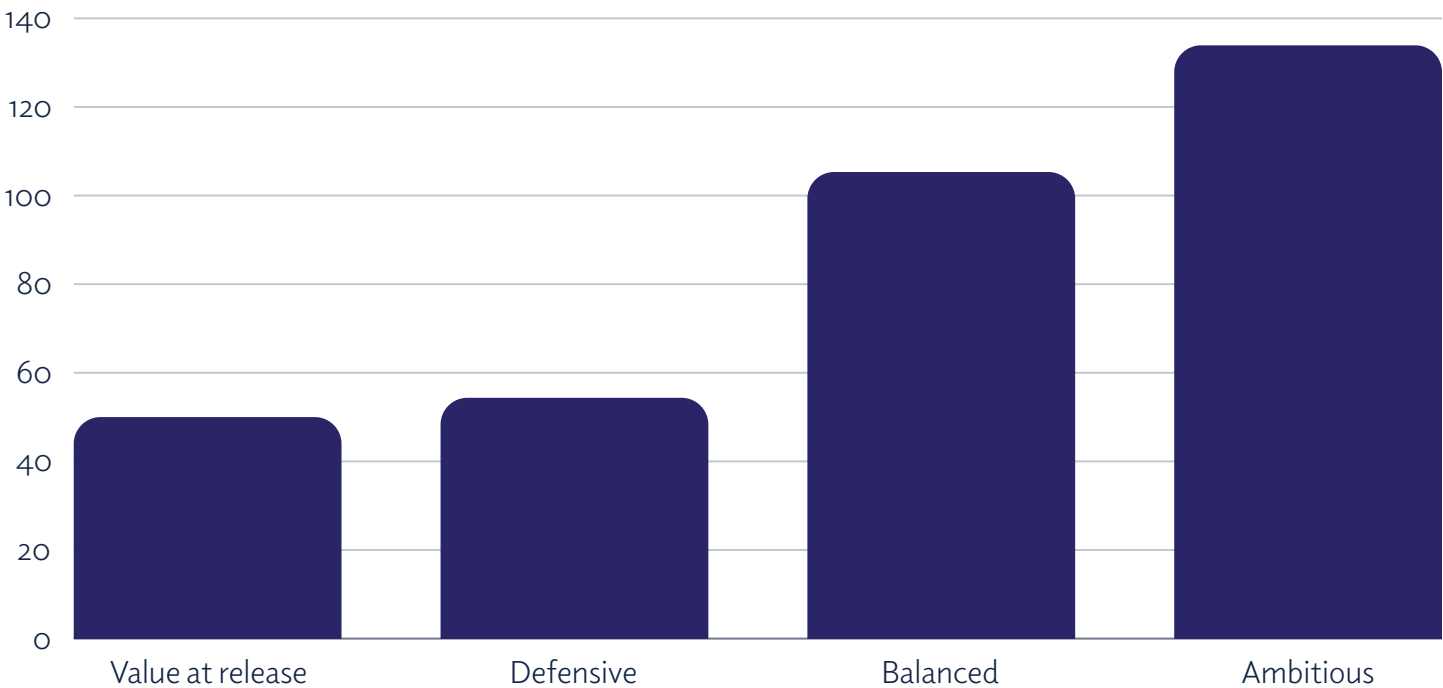
Conclusion 🎯 In summary, this Bordeaux wine portfolio offers a carefully curated investment opportunity characterized by strong historical performance, premium quality, and high liquidity. Through rigorous valuation analysis, we verified that the purchase price is competitively below market levels, creating an attractive entry point for investors. By

incorporating conservative to ambitious growth scenarios, we present a comprehensive projection for potential returns, accounting for market recovery and discount-based appreciation. With an exit strategy tailored to maximize gains based on market conditions, this portfolio provides a strategic mix of stability and upside potential. Bordeaux’s enduring appeal, market leadership, and renewed global demand make it a compelling asset class for any diversified investment portfolio.

Projection

This collection offers a low risk combined with an attractive return potential. The expected annual return ranges between 1.2% and 12.9%, depending on market conditions.

Here’s the projected value of a Splint at maturity:



All information is provided to assist in decision-making and does not constitute investment advice. The projected estimates are based on past performance data. Please note that past performance is not necessarily indicative of future results. Different types of investments involve different risks and there can be no guarantee that the future performance of any particular investment or product referred to directly or indirectly in this investment opportunity will be profitable, achieve the relevant stated level of performance or be suitable for your portfolio. Due to various factors, including changing market conditions, the content may no longer reflect current opinions or positions.