

Scotch Whisky Sherry-Butt – Strathdearn (Tomatin) 2013

- Over the past 10 years, whisky from the Highlands region has achieved an average annual increase in value of just under 10%.
- Whisky bottled in sherry casks achieves an additional value increase of up to 25% over 10 years.
- The Tomatin distillery celebrated its 125th anniversary in June 2022.



Factsheet - General



Type	Scotch Whisky
Distillery	Strathdearn (Tomatin)
Origin	Highlands, Scotland
Cask	Refill Sherry Butt
Number of Casks	1
Size	278.2 RLA, equivalent to 665 bottles
Price (excl. external maintenance costs)	20,200
ABV	59.70% each (as of June 2022)
Distillation Date	19/11/2013
Investment Horizon	8 to 10 years
Anlage ID	2227aa05-bf8d-4f51-bb7a-ad36573a4e1b

Cost Analysis

Asset Value	20,200 €
External Maintenance Cost	550 €
Price	20,750 €
Number of Splints	415
Price per Spline	50 €

- The price of €20,750 includes shipping, handling, 10 years of storage and insurance worth €550. €20,200 can be allocated to the cask.
- 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

The distillery is located in the Highlands and has a solid average growth of over **11 %**.

The offered whisky matures in a sherry cask. The supply of such casks is very limited. However, the demand for this premium whisky is constantly increasing. Therefore, such sherry-butts achieve up to **25 %** higher prices on the market.



Stability

Over the past **24** months, the average annual increase in the value of Scotch Whisky has fluctuated by **less than one percentage** point. This underlines the stability of Scotch Whisky cask investments.

Due to the continuing shortage of supply of sherry casks, it can be expected that a high level of price stability will remain.



Track Record

On the one hand, investing in aging Scotch whisky is something that has been done for more than a century.

The distillery was founded in **1897** and celebrated its **125th** anniversary in June **2022**. To be able to guarantee high production quality, the distillery removed **11** of the former **23** stills in 2002 and reduced the production volume.

Investment Horizon of 8 to 10 Years

Forecast per Splint in €	8 years	9 years	10 years
Offensiv	115	131	149
Balanced	107	120	136
Defensiv	85	93	101

- Investment horizon has been set to 8 to 10 years.
- The 2013 cask bottling will have an age of **18 years** in 9 years. The premium for whiskey from sherry casks increases with the age of the bottling. **18-year-old** whiskey from such casks are already very limited.
- 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.
 - Offensive case already occurs before the end investment horizon.

Your Return Potential

	Value in € defensiv	Value in € balanced	Value in € offensiv
Expected gross sales proceeds at maximum maturity	41,915 €	56,440 €	61,835 €
- Splint selling fees of 2%	-838 €	-1129 €	-1237 €
- External maintenance cost over investment horizon	-550 €	-550 €	-550 €
- Asset value at acquisition	-20,200 €	-20,200 €	-20,200 €
Expected return at maximum maturity	20,327 €	34,561 €	39,848 €
Average annual rate of return	7.1%	10.3%	11.3%

Why you should invest

- Whisky from the Highlands deliver a historic return of 10% per year
- Sherry casks are rare and deliver an excess return of 25%
- Over 125 years of experience



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