Dom Perignon - Rosé and Champagne Portfolio

- Average **annual increase** in value of just under **13%** for Champagne vintages released between 1995 and 2006 over the last **5 years.** For Rosé, the figure was **9%.**
- Dom Perignon's commitment to quality is such that only **four time three** consecutive vintages have been produced.
- Wine from Champagne have a historical **volatility** of **less than 6%.**

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Factsheet - General

Origin	France
Region	Champagne
Type	Champagne / Champagne / Rosé Champagne
Grape	Champagne Blend
Vintage	2008 / 2012 / 2008
Quantity	6 Bottles / 42 Bottles / 6 Bottles
Bottle Size	1,500ml / 750ml / 750ml
Rating	Robert Parker 95+ / 96+ / 95
Price per Bottle (excl. external maintenance cost)	492€ / 180€ / 400€
Investment Horizon	5 to 7 years
Asset ID	903e6de7-642b-4338-9e69-5e50c3c0fb2f

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Cost Analysis

Asset Value	12,900 €
External Maintenance Cost	950 €
Price	**13,850 €**
Number of Splints	277
Price per Splint	**50 €**

- The price of €13,850 includes the price of the asset, shipping, handling, 7 years of storage and insurance worth €950. €12,900 can be attributed to the bottles.
- Splint Invest will charge an exit fee of 2% applied to the proceeds from the sale of the bottles.
- Each Splint holder bears a proportional part of the costs.

Rating

Return

The Champagne and Rosé editions from Dom Perignon have given investors an average **annual increase** in value of 13% and **9%** respectively over the **last 5 years.**

The demand of high quality champagnes as well as the values of the same have particularly increased in the last year, as champagnes are the only European wines, apart from Italian wines, that are exempt from the new American tariffs.

Stability

Despite the high production volume, Dom Perignon is a suitable investment product. This Champagne, unlike some other vintage champagne is consumed continuously and usually is already sold out with the next release. Particularly in demand are large formats since the production of these is smaller.

Champagne wine has a historical **volatility** of **less than 6%,** which is 12% **below** that of the **S&P500.**

Track Record

Dom Perignon is a famous, if not the most famous champagne brand. Its origins go back to the Abbey of Saint Pierre d'Hautvillers, the so-called birthplace of champagne.

Only **four times three consecutive vintages** have been produced. A sign that quality is important.

Dom Perignon sparkling wines are also an integral part of the **Liv-Ex Champagne 50 Index.**

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Investment Horizon of 5 to 7 years

Forecast per Splint in €	5 years	6 years	7 years
Offensive	90	105	123
Balanced	72	81	91
Defensive	55	57	60

- Investment horizon has been set to 5 to 7 years.
- Unlike some other vintage Champagne, Dom Perignon is consumed continuously and what brings a premature scarcity. The investment horizon can therefore be set rather short for wine.
- 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 € defensive	Value in € balanced	Value in € offensive
Expected gross sales proceeds at maximum maturity	16,620 €	25,207 €	34,071 €
- Splint selling fees of 2%	-332 €	-504 €	-681 €
- External maintenance cost over investment horizon	-950 €	-950 €	-950 €
- Asset value at acquisition	-12,900 €	-12,900 €	-12,900 €
Expected return at maximum maturity	2,438 €	10,853 €	19,540 €
Average annual rate of return	2.3%	8.6%	13.4%

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Why you should invest

- Best vintage provided an annual return of **15%**
- Only **four times three consecutive vintages** have been produced
- The **volatility** of champagne is **less than 6%**

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