

**WINE WEALTH**  
*wine investment advisory*

**WINE WEALTH GmbH**  
Mattias Sundström | Director  
Email: [info@winewealth.net](mailto:info@winewealth.net)  
Web: [www.winewealth.net](http://www.winewealth.net)  
Habuelstrasse 111  
CH-8704 Herrliberg  
Zürich, Switzerland  
Telephone: +41 79 542 6760

## WINE INVESTMENT

**WINE INVESTMENT** Premium wine has become a full-blown asset class from which financial gain can be made. Supply of the very best wines remains limited by law, while demand globally and in particular from Asia keeps rising. These long-lived wines ultimately will be drunk but in the process of maturation, rise in value. This creates an opportunity for serious investors with a long-term view.

**FUND MANAGEMENT** Wine funds differ from conventional wine merchants and focus instead on genuine asset management. Our partners exhibit proven track records of high risk-adjusted returns whose funds provide

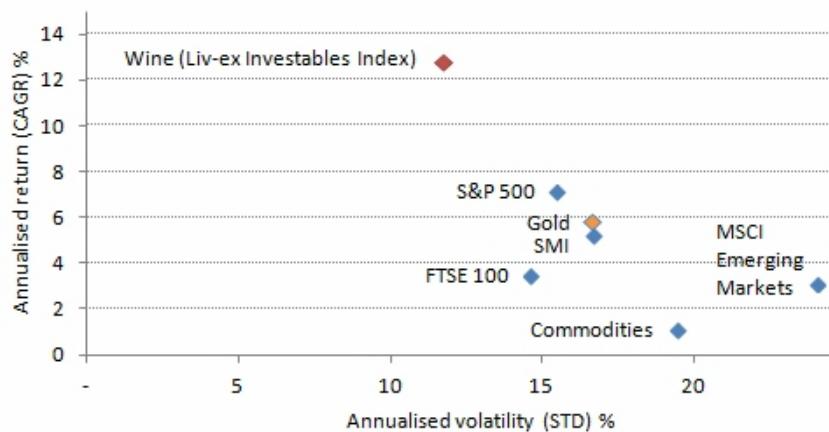


diversification benefits to investors. The fund managers select undervalued wines, relieving the investor of tough decisions about vintage, wine and

timing. They hold wine of proven provenance in secure warehousing and for which there is a proper marketplace in the form of an electronic exchange, Liv-ex.com. And importantly, fund fees are transparent. Fine wine has proven over three decades to have a low correlation to financial markets and offers a compelling investment.

**WEALTH OBJECTIVE** Wine Wealth offers the opportunity to invest in professional wine funds whose established track records deliver risk-adjusted returns, diversification and a unique story of finance and wine.

**Chart:** annual return and risk since 1993



Source: Bloomberg, MSCI, Liv-ex.com; data from 31 Dec 1993 to 31 Dec 2013

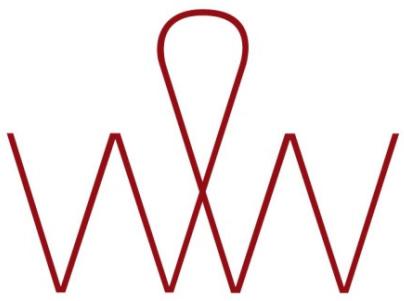
Since the 1980s annual wine returns of more than 13% outpaced equities and gold yet with lower risk

Wine is uncorrelated to financial markets and recovers more sustainably after global downturns

Adding wine to a well-balanced portfolio reduces risk due to diversification

Rising demand yet legally restricted and diminishing supply drive prices higher

Wine is an untapped asset and provides a strong alternative investment case



**WINE WEALTH**  
*wine investment advisory*

**WINE WEALTH GmbH**  
Mattias Sundström | Director  
Email: [info@winewealth.net](mailto:info@winewealth.net)  
Web: [www.winewealth.net](http://www.winewealth.net)  
Habuelstrasse 111  
CH-8704 Herrliberg  
Zürich, Switzerland  
Telephone: +41 79 542 6760

## VINEYARD INVESTMENT

Investing in wine real estate in France has been rewarding business as prices per hectare has tripled in the last twenty years, and for the best AOC-rated land prices have risen at a rate of nine per cent annually – a five-fold increase. As with any investment, skilful selection among prospects is essential: of the 8'000 properties in Bordeaux alone, only a fraction have true potential for value creation of the land, winery and marketing of the end-product.

Quality is dependent on a number of factors, but a good vineyard and a skilled winemaker are essential starting points. At the



premium end, they are in short supply and this is why careful selection of wine real estate and its management can be a very attractive long term investment.

**FUND MANAGEMENT** Vineyard funds with decades of experience

offer expertise in terms of working closely with real estate professionals, winemaking specialists and business strategists to elevate properties in their portfolio to higher standards. In so doing, their long-term participation has generated attractive annual income as well as capital gains upon exit.

Wine production is becoming increasingly dynamic and the injection of capital can be highly rewarding for the consumer as well as for the winemaker and the investor. With the appropriate expertise, premium winemaking is worlds apart from cash-draining volume viticulture.

### The opportunity:

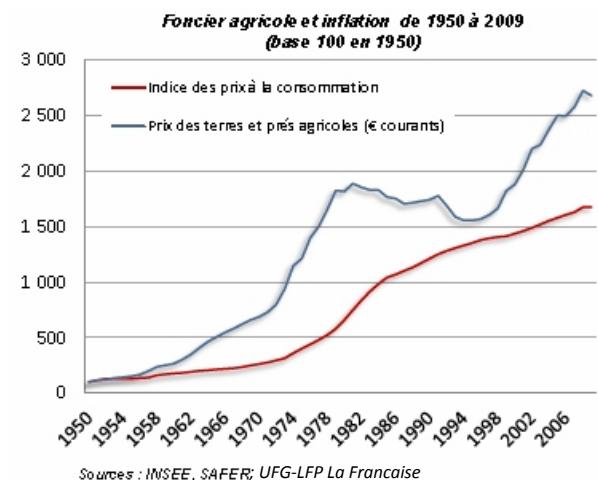
- to gain from a rise in premium-vineyard property prices and;
- to enjoy value creation from an operating business

### The method:

- Vineyard land
- Winery property
- Brand development

### The appeal:

- Relative safe haven status of top-quality wine real estate
- Real and counter-inflationary asset with low correlation
- Income stream
- Exposure to a prestige segment



*Annual returns from French AOC vineyards over the past 20 years have been in excess of nine per cent*

*Investments in French vineyards stands at between \$1-3 billion annually with an average spend of \$2-4 million*

*Portfolio diversification benefits are gained through investing in uncorrelated wine real estate*

*Supply of premium wine real estate is limited while demand for higher-quality wine continues to increase*

*Vineyard land is an established asset that provides a compelling and alternative real estate investment*