



# BACCHUS FINE WINES

YOUR TRUSTED PARTNER IN  
FINE WINE INVESTMENT





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## ABOUT US

Wine lovers not salesmen.

Full transparency.

Unmatched commission.

Qualified and experienced.

Accredited LIV-EX members.

HMRC bonded storage.

Owned and insured.

In your name.



## OUR TEAM



*"I started investing in wine over 10 years ago and have experienced many highs and lows. This all changed for me when I started trading wines in a completely different way, a way that Bacchus will offer to each and every client that wishes to work with us."*

**Mark Young - CEO**

**Mark set up Bacchus Fine Wines with the mission to show that wine trading done with the right person and products, also correctly valued, can be a truly excellent investment. We will offer expert advice but there will be no heavy sales pitch, no false promises and definitely no inflated margins added.**

*"Having spent the last decade working across the wine industry from the winery to restaurants and retail to trading, my goal is to combine my love of wine and put my knowledge of the market to use, with the aim of making the intimidating world of wine investment more accessible for all."*

**Rob Cole - Senior Wine Advisor**





# WHY INVEST IN FINE WINE

Fine wine increases in value because every wine is a finite resource, led by supply and demand.

Each vintage is an expression of time and place, it cannot be replicated. The limited availability of each annual expression is precisely why fine wine's enigmatic subtleties are such amazing opportunities for the investor, and unique pleasures for the consumer.

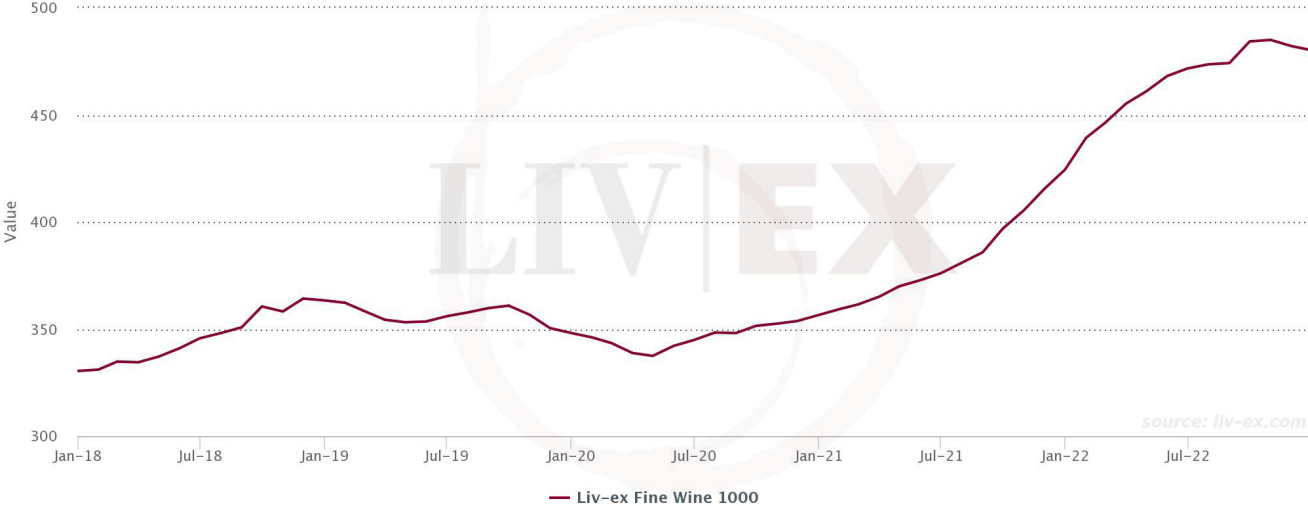
As global consumption outstrips the supply, the value of individual cases of wine increases. Investing in fine wine offers you protection of your capital because it's an asset that you own outright, it has a positive track history with double digit tax-free returns and provides diversification to your portfolio. Over the past 10 years the LIV-EX 1000 averaged around 10% per annum.

It is proven less volatile than the financial markets, property markets and less susceptible to market downturns, hedging itself against recession, inflation, and currency debasement. The fine wine market is a sound investment vehicle in combination with a diverse portfolio of other more traditional instruments.

Fine wine is also an increasingly popular addition to the world's most prestigious luxury investment portfolios, due to clear evidence of its year on year ability to outperform art, watches, classic cars, antiques and more.

Investing in wine presents an opportunity to join an exclusive club of investors, where the asset is stable and desirable. Demand will certainly continue growth, bolstered by increasing interest and contribution from BRIC countries to global fine wine investment.

# 5 Year LIV-EX 1000 index



1yr 13.1%

2yr 34.7%

5yr 45.3%

# DRIVERS OF FINE WINE

**Branding** - With a long history of excellence, the Liv-Ex 1000 proprietors aim to perpetually increase their profile. Outperforming other proprietors in the same category is the key to how they further their prestige and exclusivity, this fuels demand and drives value for the investor.

**Vintage** - The best vintages with the finest growing and harvest conditions, result in the best fruit and highest quality of wine. These wines demand higher prices and their potential to mature over long periods of time result in an oversized RIO compared to a lesser vintage. The reputation of a certain vintage will influence the price of a wine more than the actual taste and quality.

**Demand** - The ever increasing demand for fine wine is simple. Whilst all assets react to various trends, the finite nature of supply regarding fine wine makes it a scarce commodity. As time passes the number of potential new buyers, investors, drinkers and enthusiasts increases, consistently increasing value annually.

**Wine Critics** - As the popularity of wine consumption increases, the quantity of professional perspectives has increased too. There are a wide variety of reputable awards, publications, magazines, websites and critics to inform us. When the most esteemed critics score a wine highly, it increases demand and drives value up.

**Drinking Window** - Critics give individual wines a particular recommended drinking window, informing us of a suitable amount of time to mature said wine. Once the commercial and private consumers decide to drink them, the supply is diminished and their exclusivity increases their value.

““ If you had invested \$100 in the fine wine market in 1952, your investment would now be worth \$420,000. On the other hand, \$100 invested in the stock market would now be worth a modest \$100,000. Recent research shows that, thanks to this impressive track record, the majority of financial advisors would support investing in fine wine as a way to diversify certain client portfolios. ””

Warren Buffet

# WHAT IS LIV-EX?

# LIV | EX

THE FINE WINE MARKET

Liv-Ex is the global marketplace for the wine trade. It is an independent membership organisation used by the world's major fine wine merchants.

Founded in 2000 with just 10 members, it has now grown to more than 600 businesses trading on the platform worldwide.

No private collectors can trade on Liv-Ex, as membership is exclusive to wine trade professionals, from distributors to retailers, importers and brokers.



# GROWTH SUCCESS STORIES IN INDIVIDUAL WINES OVER 5 YEAR AND 10 YEAR PERIODS

## 5 years examples:

Region	Wine	Vintage	Jan-17	Jan-22	Growth
Bordeaux	Chateau Lafite Rothschild Premier Cru Classe Pauillac	2014	£3,908	£6,581	68.40%
Burgundy	Domaine de la Romanee-Conti Richebourg Grand Cru	2010	£14,244	£54,000	279.10%
Tuscany	Sassicaia, Tenuta San Guido Bolgheri	2009	£1,380	£2,880	108.70%
California	Ridge Cabernet Sauvignon Monte Bello Santa Cruz Mountains	2011	£1,000	£2,520	152%

## 10 years examples:

Region	Wine	Vintage	Jan-12	Jan-22	Growth
Bordeaux	Chateau Figeac 1er Grand Cru Classe B St-Emilion Grand Cru	2005	£840	£2,292	172.85%
Burgundy	Domaine Leroy Clos de Vougeot Grand Cru	2000	£4,860	£65,378	1245.20%
Tuscany	Masseto Toscana	2006	£4,800	£11,800	145.80%
California	Dominus Napa Valley	2005	£660	£2,400	264%
Champagne	Salon Le Mesnil-sur-Oger Grand Cru	1999	£1,900	£11,200	489.50%

# PORTFOLIO SELECTION CRITERIA

We select wines suitable for the needs of individual investors based on your personalised investment criteria and goals.

The following factors dictate how we can position you in the best opportunities in the market:

Brand.

Quality of vintage.

Vintage volume production.

Critic reviews.

Historical market performance.

Market availability.



# OUR PROCESS



## **Enquiry**

We establish your objectives, time-frame, risk tolerance and desired returns.



## **Selecting your portfolio**

With the aim of security and growth, we utilise our expertise to help you navigate the subtleties of the fine wine market.



## **Cost Transparency**

Through our commitment to creating a trusting relationship with our investors, we maintain complete transparency on our unbeatable commission and pricing structures.



## **Transfer of funds**

Once we have agreed on your portfolio selection and you are satisfied with our advice, you will be sent the relevant transaction paperwork for you to complete your purchase.



## **Transfer of ownership**

A private account will be set up in your name, and your wines will be transferred to your account under your ownership.





## WINE STORAGE

Our choice of HMRC recognised Bonded Warehouse is London City Bond (LCB). You may choose to use a different facility, with whom we are happy to work with.

We do this to ensure the provenance of your assets. We also provide condition reports and pictures for a small fee, this validates the condition of your wines and assures they're kept in an ideal temperature and humidity controlled environment, for proper maturation. The cost of storage and insurance in these bonded warehouses is nominal when compared to overall market growth. We will discuss these details with you throughout your enquiry.

# ACCOUNT MANAGEMENT

After your investment, your consultant will be on hand to answer your queries promptly, provide you with regular performance updates, recommendations to buy or sell, and utilise their resources and knowledge of the market to provide you with up to date insights into your portfolio.



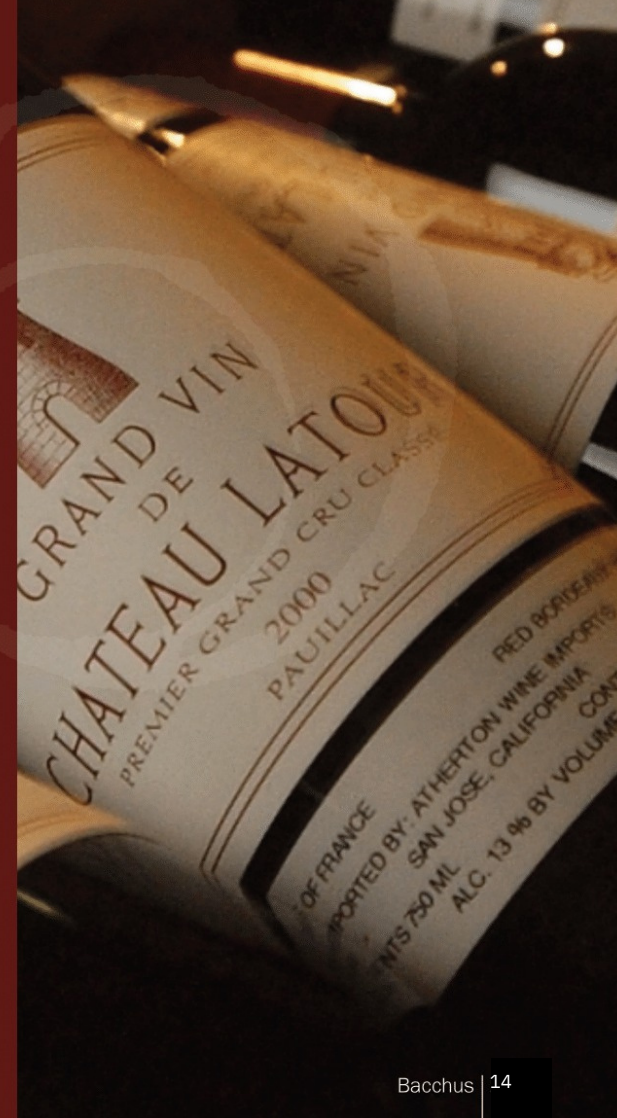
Consultant on hand to answer your queries



Regular performance updates




Knowledge of the market



# DISCLAIMER

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