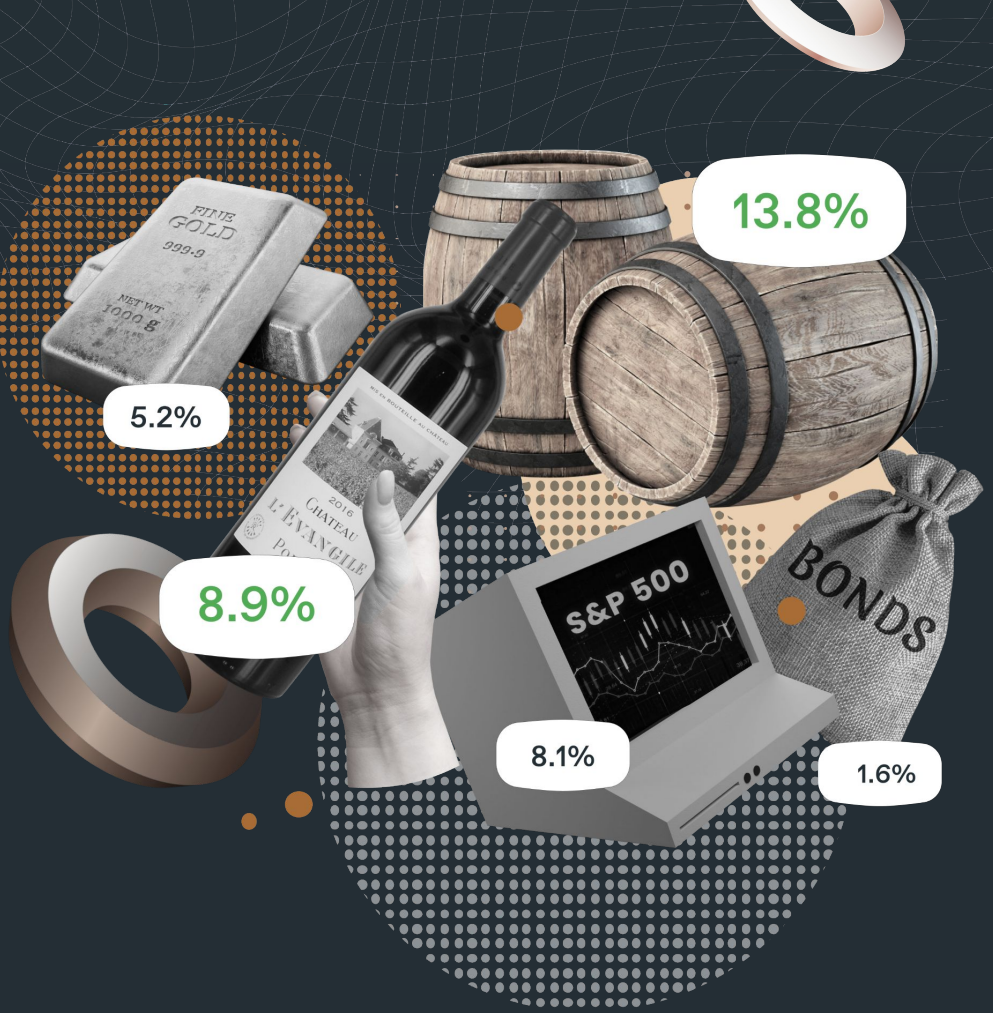
vino vest

Protect and grow your wealth beyond the stock market



The Challenge

Diversity

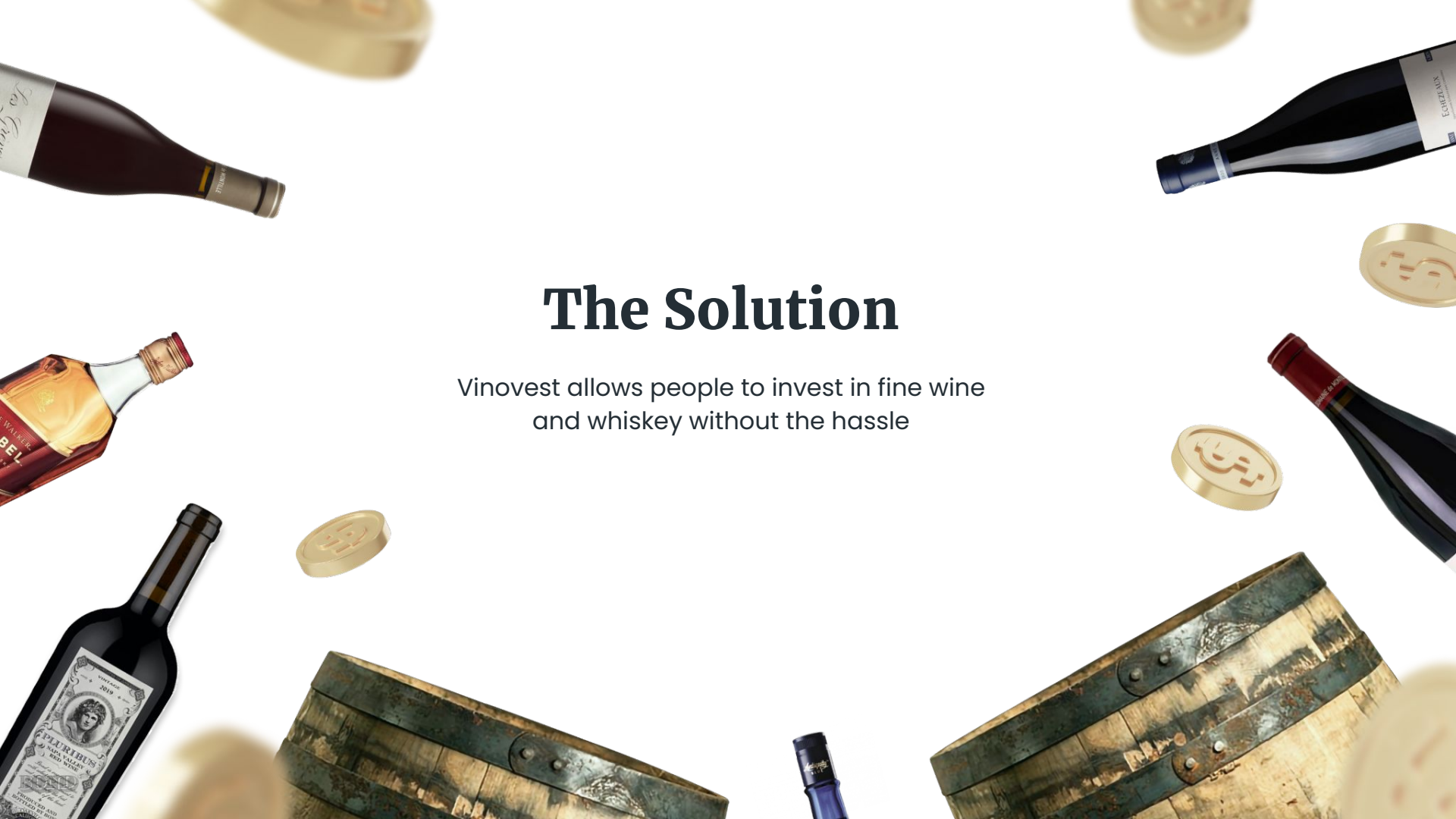
is an essential part of a portfolio

Stocks

are tightly correlated, making them vulnerable during economic downturns

Few options exists

to diversify your wealth beyond stocks



The Solution

Vinovest allows people to invest in fine wine and whiskey without the hassle

Vinovest Uncorked

Here's what makes Vinovest the largest wine and whiskey investing platform in the world

Global Clientele

Vinovest has more than 150,000 users in more than 40 countries

Unparalleled Cellar

We have more than 650,000 bottles in our care and more than $100,000,000 invested on our platform

International Team

24 full-time employees across Europe, North America, and Asia

Constant Innovation

Introduced the first single bottles marketplace, first mobile app, and first community of its kind for wine and whiskey investing

Licensed Worldwide

Vinovest has wholesale, import, and export licenses to access the best wine at the most competitive prices

Vinovest Council

Our advisory team includes master somms Dustin Wilson and Jonathan Ross, as well as wine directors DLynn Proctor and Jane Lopes

Why Wine and Whiskey?

Here's what makes Vinovest the largest wine and whiskey investing platform in the world

Attractive Historical Returns

Inflation-Resistant

Diversification

Low Volatility

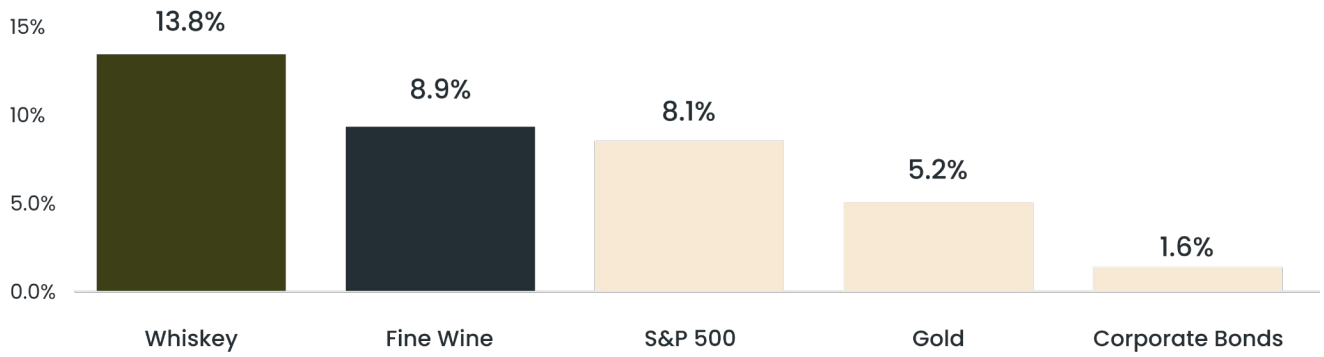
100% Ownership

Low Correlation with Stock Market

Attractive Historical Returns

Fine wine and whiskey have outperformed the S&P 500 over the last seven years

Fine Wine & Whiskey vs. Other Asset Classes: 2015 to 2022



The performanced represented in this chart range from January 1, 2015 to December 31, 2022. Fine wine - Liv-ex Fine Wine 1000 Index. Fine whiskey - Rare Whisky Icon 100 Index. S&P 500 - S&P 500 Index. Gold - LBMA Gold Price. US Corporate Bonds - S&P 500 Investment Grade Corporate Bond Index. Real Estate - S&P/Case-Shiller U.S. National Home Price Index.

Low Correlation with Stocks

Fine wine has almost no correlation with the stock market

Correlation

LVX1000	1.00					
MSCI Emerging Markets Index	0.30	1.00				
MSCI Europe Index	0.21	0.80	1.00			
MSCI Index Japan	0.20	0.58	0.60	1.00		
MSCI Index United Kingdom	0.20	0.76	0.94	0.55	1.00	
MSCI World Index	0.19	0.79	0.92	0.70	0.87	1.00
S&P 500 Index	0.12	0.67	0.79	0.62	0.76	0.96	1.00

Recession Resistant

'Liquid' assets have outperformed stock indices over the last three recessions

	Fine Wine	S&P 500	Dow Jones
Covid-19 Recession	-4.1%	-18.8%	-21.1%
Great Recession	-8.4%	-30.3%	-25.6%
Dot-Com Bubble	7.2%	-18.2%	-19%

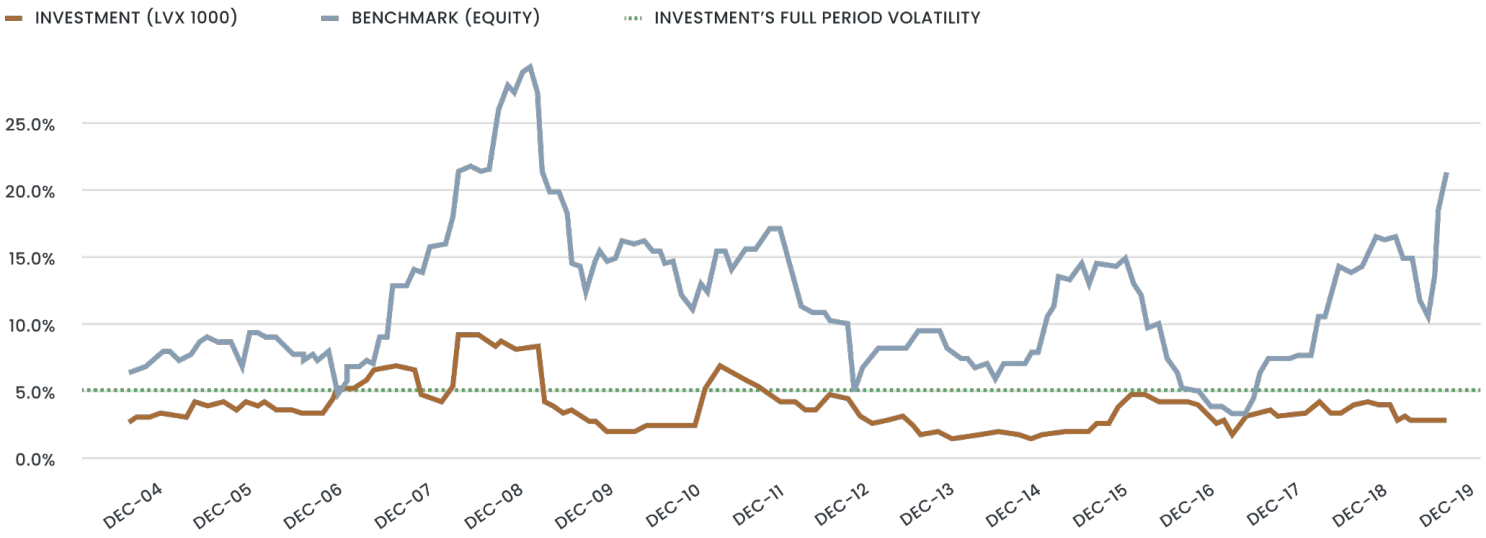
Covid: Jan 3, 2020 - Mar 20, 2020 Great: Dec 31, 2007 - Jun 30, 2009 Dot-Com: Aug 1, 2000 - Dec 30, 2002

Source: Liv-ex with dividends reinvested

Low Volatility

Fine wine has roughly one-third the volatility of global equities

Rolling Volatility



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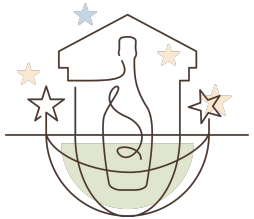
How It Works

Step 1:



Tell us your goals

Step 2:

We build your portfolio

Step 3:

Track your portfolio growth

www.vinovest.co

Tell us your goals

Meet with the Vinovest team to discuss your unique investing goals

Liz Dowty Mitchell

Head of Wine

Laura Otey

Portfolio Manager

Ryan La Valle

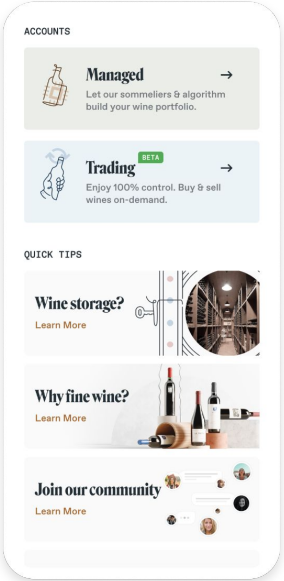
Portfolio Manager

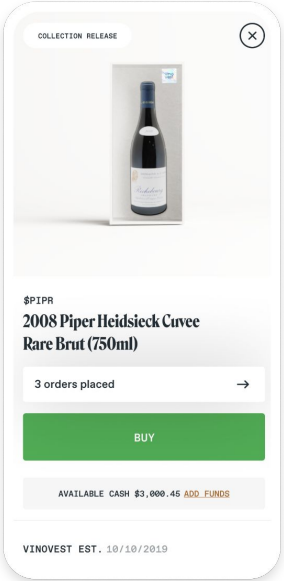
Hunter Robillard

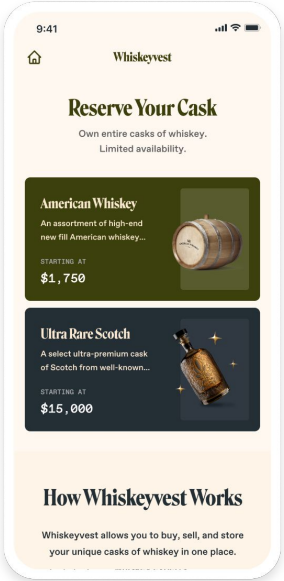
Head of Whiskey

We build your portfolio

We leverage our global network to buy high-appreciating wine and whiskey at competitive prices. We also take care of storage, insurance, and authentication.







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Track your portfolio growth

We recommend holding a wine for 5-10+ years and whiskey for 2-10+ years. When it's time to sell, we work with consumers to find the highest price for your assets.

ANGEL'S ENVY

ST. AUGUSTINE DISTILLERY
THE SPIRIT OF FLORIDA

Breckenridge
BOURBON WHISKEY

BULLEIT
BOURBON

GEORGE
Dickel

HIGH
WEST
WHISKEY

JEFFERSON'S
Bourbon

TEMPLETON RYE

WHISTLEPIG
-RYE WHISKEY-

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How we pick wine and whiskey

We consider more than a dozen factors and millions of data points to find the right assets

Supply and Demand

Scarcity

Brand Equity

Long-Term Appreciation

Diversification

How we pick wine and whiskey

Deposit Amount

$50,000

Portfolio Size

15 - 25 cases/ casks

Sample Portfolio (cases/casks)

California cab: ~$7,200 (3)

Premier cru Burgundy: ~$4,800 (3)

Top-tier Super Tuscans: ~$9,000 (3)

Vintage Champagne: ~$9,000 (3)

First-growth Bordeaux: ~$15,000 (3)

Grand Cru Burgundy: ~$7,200 (2)

American whiskey: ~$3,000 (2)

Scotch whisky: ~18,000 (1)

Cash reserve: -$1 ,800

2013 Cristal

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Why Now?

Diversification Benefits

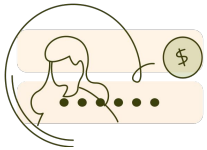
Wine and whiskey are tangible assets with finite supplies that become more scarce with consumption.

Unique Opportunities

Factors such as weather, supply shortage, and consumer tastes have created new opportunities across global markets.

Next Steps

Step 1:

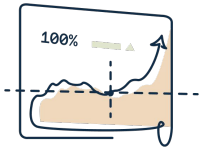


Fund your account

Step 2:

We build your portfolio

Step 3:



Track your portfolio growth

Step 4:

Reach out to customer support with questions

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Neither Do Business. Do Life Podcast, Triad Partners, LLC nor Brad Johnson is endorsing Vionovest, their wine or whiskey portfolios as a suitable investment. Wine and Whiskey are unique investments which may include long holding periods, illiquidity, or loss in value. Each individual should make their own decision about their investments with the help of qualified professionals.
Brad Johnson is an investor in and a client of VinoVest
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