

## The Disciplined Investor Podcast – Guest Interview Summary

Guest: Jeremy Kasler

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### **Summary**

#### **Entrepreneurial Journey in Art Market**

Jeremy discussed his entrepreneurial journey, starting with selling Christmas wrapping paper and later hot dogs in London. He then transitioned into the art world, founding the Art Futures Group, a major broker in Chinese contemporary art. Jeremy explained how he entered the alternative investments market with wine in Sydney, later launching a successful business in Singapore, which he eventually sold. After a gap year in Asia, he observed the wealth in Hong Kong and decided to enter the art market, leveraging the booming Chinese contemporary art scene.

#### **Art and Whiskey Investment Insights**

Jeremy discussed his experience selling Chinese contemporary art to investors over the phone in Hong Kong, including the establishment of a rental program to maximize returns. He then explained how inquiries about whiskey investments led to the launch of a new business in the US, initially focusing on Scotch before expanding to include bourbon.

#### **Bourbon Investment and Barrel Opportunities**

Jeremy explained that 95% of their business involves bourbon in the US market. He detailed their investment process in whiskey and casks, which includes partnering with distilleries like Jackson Purchase and purchasing new make bourbon barrels. Jeremy outlined that they offer these barrels to accredited investors, including 8 years of storage and insurance, as the value of bourbon increases over time. Andrew inquired about the ingredients in the new make bourbon, which Jeremy confirmed was a high wheated version.

## **Bourbon Aging and Investment Basics**

Andrew and Jeremy discussed the aging process of bourbon, comparing a one-week-old to a five-year-old bourbon. They explained how the angel's share, which is 3-5% evaporation per year, affects the flavor and proof of the bourbon. Jeremy described the investment process, noting that investors need to be accredited and hold the investment for at least one year. They also discussed different ways to enjoy bourbon, including adding a drop of water or a small ice cube.

## **Bourbon Barrel Investment Market Overview**

Jeremy and Andrew discussed the bourbon barrel investment market, focusing on the scarcity of aged barrels and the practice of distilleries selling barrels to other brands. Jeremy explained that the investment involves storing barrels at distilleries for 8 years, with insurance coverage and a historical return rate of around 12% per annum. They highlighted the tangible nature of the investment, the opportunity for clients to visit their barrels, and the appeal of investing in something they passion about, particularly bourbon.

## **Global Whiskey Market Trends Analysis**

Jeremy and Andrew discussed the global whiskey market, focusing on trends and geopolitical factors. They noted that while some countries have imposed tariffs, others, like India and Hong Kong, have reduced or eliminated them, balancing out the market. Andrew shared insights on changing consumer preferences, highlighting a trend among younger generations towards alternatives like cannabis and ready-to-drink options, which Jeremy found concerning.

## **CaskX Barrel Investment Program Overview**

Jeremy discussed the trends in premiumization and aging in the spirits industry, noting that while fewer people are drinking, those who do are choosing higher-quality, aged products. He explained CaskX's barrel investment program, where individuals can purchase and own 50 or more barrels of whiskey, with a minimum investment of \$56,000 for 24 barrels. Jeremy clarified that investors own the barrels outright and have the option to keep them or sell them after aging, with the potential for significant returns on investment.