

The Caledonian Malt Fund L.P. secures regulatory approval under the Investment Funds Act of Bermuda

The Caledonian Malt Fund L.P. is a Bermuda registered alternative investment fund to invest in Scotch Whisky as an institutional asset. Fund's investment objective is to seek total return through investment in premium whisky casks and bottles.



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London, United Kingdom Sep 5, 2025 ([IssueWire.com](https://www.IssueWire.com)) - The Caledonian Malt Fund L.P. secures regulatory approval as a Professional Closed Fund under the Investment Funds Act of Bermuda

The Caledonian Malt Fund L.P. ("CMF" or the "Fund"), the alternative investment fund focused on investing into Scotch whisky, announced its launch after securing regulatory approval from the Bermuda Monetary Authority (the "BMA"). The Fund will invest into a diversified portfolio of premium and investment grade Scotch whisky drawn from the most reputable distilleries of the whisky producing sub-regions of Scotland.

Highlights:

- Principal investment objective of the Fund is to seek total return through investment in Scotch whisky casks and bottles, with an aim to create a diversified and broad-based investment portfolio that provides both investment stability as well as strong upside potential.
- The Fund will make direct investments into high quality investment grade premium casks from reputable and well established distilleries to construct an Investment Portfolio covering the maturation spectrum.
- Assets will be stored and matured in UK Government regulated, HMRC licensed and registered bonded warehouses, ensuring professional storage and comprehensive insurance, while navigating custody related compliances.
- Investments and exits will be driven by extensive data analysis and inputs from primary and secondary markets, leveraging fund's proprietary industry network, unique expertise in portfolio management, yield generation, and value creation to maximize returns.
- The Fund is registered with the Bermuda Monetary Authority under the Investment Funds Act as a Professional Closed Fund with a standard GP: LP structure. Investment fund structure ensures an institutional approach to whisky investment with focus on value maximization and risk management.

Commenting on the launch of the Fund, **Roderick Sampson, Chairman of the Investment Advisory Committee**, said – We are proud and excited to launch our investment fund through Bermuda and the BMA, which provides an ideal home for the Caledonian Fund. Through the Fund, we will continue to seek out opportunities in the global Scotch whisky industry and thereby create long term value for our investment partners and support the growth of our broader stakeholders.

Mike Webb, Member of the Investment Advisory Committee, added - "Investment in Scotch whisky is getting mainstream as an alternative investment, as the industry is getting institutionalized. Whisky casks have historically delivered value and non-correlated returns on investment and investors can consider an allocation for the investment portfolio to build generational wealth over the long term."

"CMF will operate as a regulated investment fund with compliance to relevant regulations. The Fund will bring institutional capability & market intelligence and leverage our proprietary network to generate better risk-adjusted returns for our investors. We have put together a fund team having deep network and insights of the Scotch whisky industry, asset management and alternative investments. We understand the unique challenges and opportunities to create value in this competitive market" said **Amit Tripathy, Fund Manager**.

Advisor to the Fund, Doug McIvor said "The Scotch whisky industry has evolved over the recent years, creating opportunities for institutional investors to realize substantial returns. CMF's commitment to long-term growth through innovation and entrepreneurial thinking will shape a future that meets the evolving needs of our partners and the markets we serve."

Sarah Demerling, Partner at Walkers (Bermuda) Limited, legal counsel to the Fund said "Bermuda is a perfect location to establish this structure and strategy and we are delighted to have worked with the

CMF team so far and continue to wish them success."

For further communication, please contact below:

Investor Relations

Email: connect@caledonianfund.com

Web: www.thecaledonianmaltfund.com

Address:

The Caledonian Malt Fund L.P.

Park Place

55 Par-la-Ville Road

Hamilton HM 11

Bermuda

Media Contact

The Caledonian Malt Fund L.P.

*****@caledonianfund.com

Hamilton Bermuda

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