

PORTFOLIO ASSESSMENT

ANALYSING COMPOSITION, RISK, PROFITABILITY AND STRATEGIES



As one's real estate portfolio grows in scale, it is easy to become lost in all the details, failing to monitor the performance of the assets and the risks associated. Are the yields up to par? Has the capital values increased or decreased? Are the financing arrangements optimised? Will the assets face threats as changes happen to the economy, politics, currency, regulations, location and demand/supply conditions? Should one continue to hold, sell or acquire additional assets inline with the objectives?

A property portfolio, although is by far much more stable than most other asset classes, does require regular monitoring and assessment given the ever-changing global political and economic climate of today.

In our **Portfolio Assessment** service, we work closely with our clients to understand their portfolio and

perform the necessary research and analysis to determine the performance, potential and risks on their asset. We then measure and align the portfolio to their investment objectives, ascertaining if any adjustments are necessary.

For example, in 2015 we deemed that the continual political and economic instability in Europe will further depreciate the GBP hence clients should reduce their exposure. Similarly, our expectation of regulatory changes across many major markets such as Singapore, Australia and Hong Kong have allowed our clients time to defend their portfolio more effectively

In a world of certain uncertainty today, assessing the performance of a portfolio is key to ensure not only optimised returns, but more importantly, consistent risk mitigated performance for the days to come.



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HOW DOES IT WORK?

Our team will engage with you to perform a detailed understanding of your current assets and do the necessary research and analysis to determine the performance, potential and risks for each asset. We will then examine the portfolio as a whole to determine its diversity and alignment to your goals and intents before recommending the necessary to align and optimise the portfolio to them.

WHO IS IT FOR:

- Clients with an existing portfolio of real estate assets who require a clear and in-depth assessment of their current portfolio and financial situation

WHAT WE PROVIDE:

- We will assess all aspects of your current portfolio, researching on each individual asset to determine their performance, potential and risks
- We will review your financing arrangements against options available in the market
- We will determine if the portfolio aligns with your goals and time horizon and recommend adjustments if necessary
- We will provide a report as well as a consulting session to present the findings for your portfolio



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