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Brock University

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Welcome to Business Breathers
Real Estate Investment Basics

Taking businesses, careers and ideas to the next level

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Robyn Brown: Current and Future Growth Trends in the Housing Market

Shaheryar Mian: Real Estate Investment Basics

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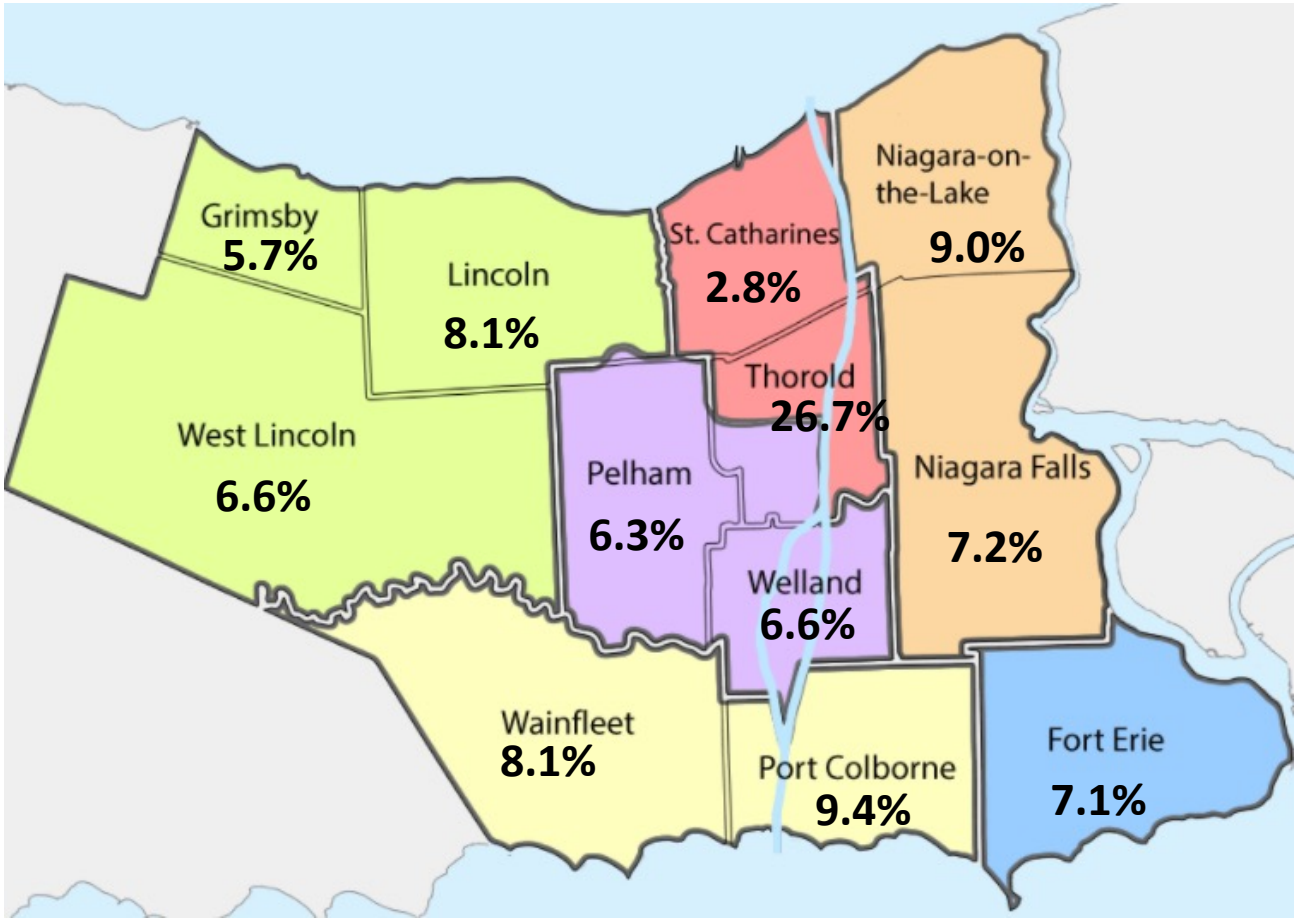
AJ Vance: Real Estate Investment Basics

Earnest Biktimirov: Investment in real estate through publicly traded securities

Taking businesses, careers and ideas to the next level

2016-2021 Population Growth



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Growth forecast- Niagara Region

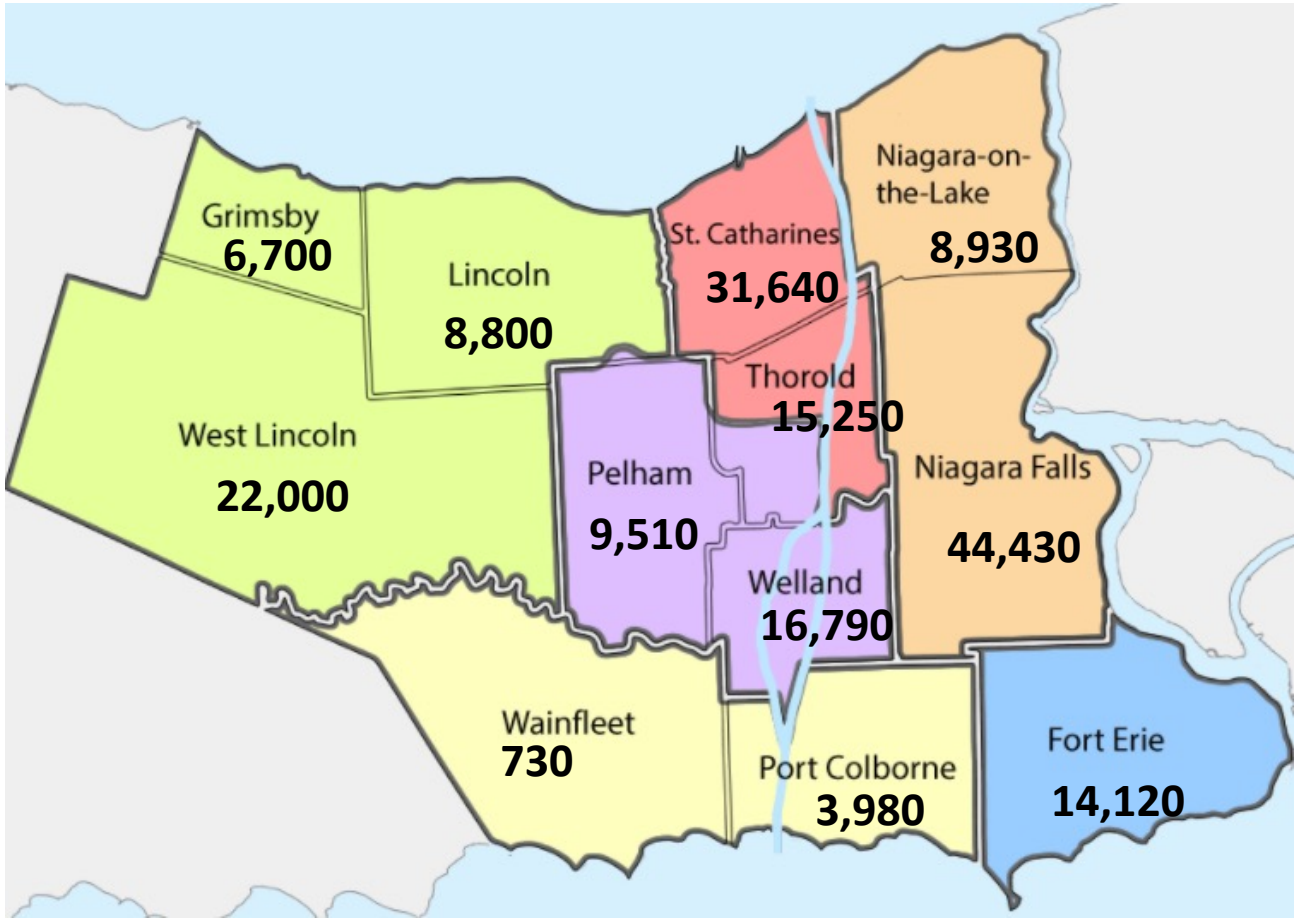
4.2 million
immigrants
to the GTHA
(2021-2051)

92,000
new residential
units (2021-2051)

85,000
new jobs
(2021-2051)

2 million sf
office
development
(2021-2051)

2021-2051 Population Growth



Investment in real estate through publicly traded securities

- Real Estate Investment Trusts (REITs)
- Exchange-Traded Funds (ETFs)
- Mutual funds

Investment in real estate through publicly traded securities

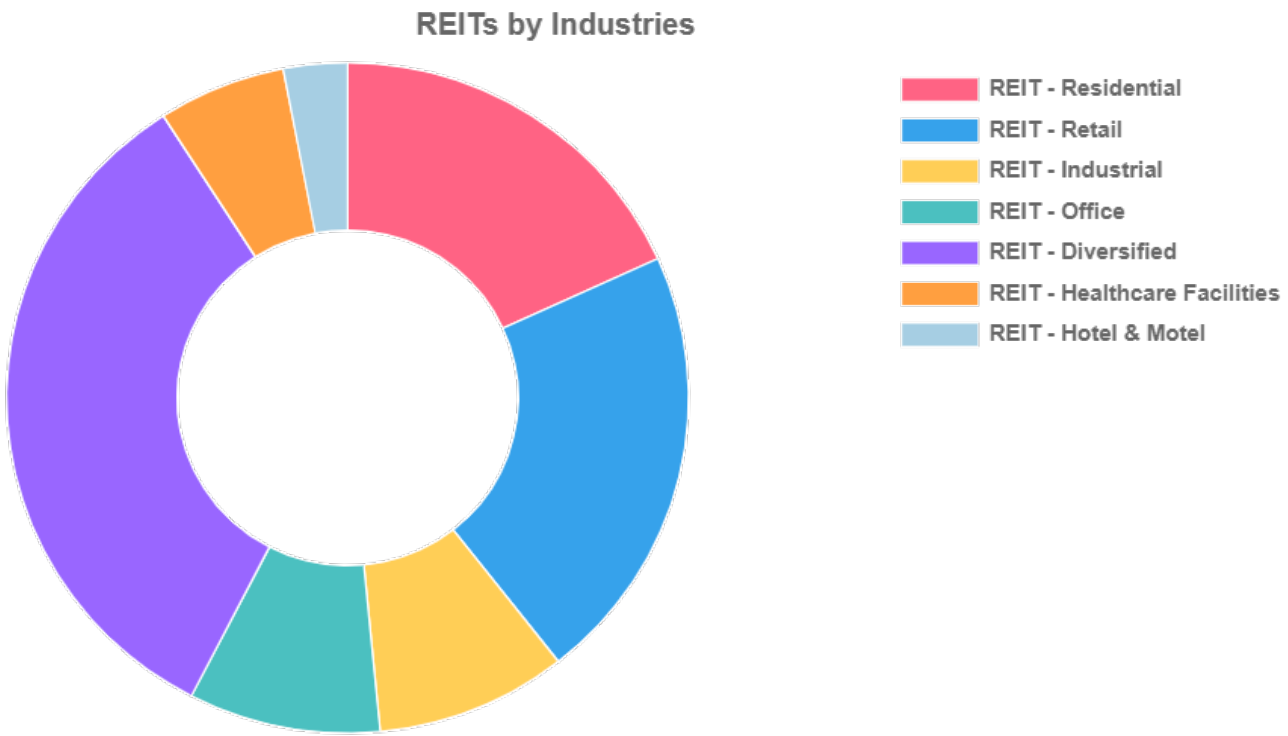
Benefits:

- High liquidity
- Broader investment opportunities
- Diversification
- Professional management
- Small investment size
- Divisibility
- Tax advantages

Real Estate Investment Trusts (REITs)

39 REITs are traded on TSX

Attractive yields, monthly dividends, and long-term growth



Real Estate ETFs

ETF Provider	Ticker	NAV	Fees	MER	Yield	Frequency
CI	RIT	0.791B	0.75%	0.90%	4.24%	Monthly
BMO	ZRE	0.811B	0.55%	0.61%	4.18%	Monthly
Purpose Investing	PHR	0.420B	0.65%	0.78%	3.81%	Monthly
Vanguard	VRE	0.287B	0.35%	0.39%	3.16%	Monthly
BlackRock	CGR	0.264B	0.65%	0.71%	2.40%	Quarterly
BlackRock	XRE	1.410B	0.55%	0.61%	2.31%	Monthly

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Real Estate ETFs

Factsheet | January 31, 2022

Vanguard FTSE Canadian Capped REIT Index ETF

VRE

ETF characteristics

	VRE	Benchmark
Number of stocks	16	16
Median market cap	$7.0B	$7.0B
Price/earnings ratio	11.5x	11.5x
Price/book ratio	1.2x	1.2x
Return on equity	7.5%	7.5%
Earnings growth rate	7.1%	7.1%
Equity yield (dividend)	3.1%	3.1%

Top 10 holdings (% of net asset value)

	VRE
Canadian Apartment Properties REIT	14.5%
FirstService Corp.	11.4
RioCan REIT	10.5
Granite REIT	8.9
Colliers International Group Inc.	8.8
Allied Properties REIT	8.4
SmartCentres REIT	5.9
First Capital REIT	5.7
Choice Properties REIT	5.5
H&R REIT	5.4
Total	85.0%

Sector weighting

	VRE	Benchmark
Retail REITs	23.5%	23.5%
Real Estate Services	20.2	20.2
Residential REITs	17.6	17.6
Office REITs	16.9	16.9
Industrial REITs	8.9	8.9
Diversified REITs	8.7	8.7
Real Estate Holding and Development	4.3	4.3
Other	0.0	0.0
Total	100.0%	100.0%

The sector allocations provided exclude any temporary cash investments. Sector categories are based on the Industry Classification Benchmark system ("ICB"), except for the "Other" category (if applicable), which includes securities that have not been provided an ICB classification as of the effective reporting period.

Real Estate Mutual Funds

- No brokerage account is needed
- Minimum initial investment: $100 - $500
- Distributions: quarterly or annually
- Management expense ratio (MER): 2% – 3%

Goodman Group Programs

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Canadian Business for Internationally Trained Professionals

Program Details

- April - June, 2022
  Tuesdays & Thursdays
- Instructor-Led
- Price: $3,295 +HST
- Register:
  brocku.ca/goodman-group

Questions?

- Contact prodev@brocku.ca

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Non-Profit Leadership Certificate

Program Details

- May - June, 2022
  Tuesdays & Thursdays
- Instructor-Led
- Price: $3,395 +HST
- Register:
  brocku.ca/goodman-group

Questions?

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Thank you for joining us.

Next Session:

Lead with AND – Unleash the superpower of Both/And leadership in an Either/Or world

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