

Welcome to APAA & AMBC Workshop

We will start from 19:00
Feel free to submit your questions via Sli.Do



AUSTRALASIA
PROPERTY ADVISORY
ASSOCIATION



Acknowledgement

APAA and AMBC would like to acknowledge the Wurundjeri people who are the Traditional Custodians of this Land. APAA and AMBC would also like to pay our respects to Elders past, present and emerging.



AUSTRALASIA
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ASSOCIATION





Our Team

We are a not-for-profit organisation creating a community for property developers and multidisciplinary leaders that operate across the entire development lifecycle.

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www.ambcvic.org.au



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Secretariat

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PropertyGuru

**ASIA
PROPERTY
AWARDS™**
AUSTRALIA

The PropertyGuru Asia Property Awards is the leading industry awards programme rewarding only the region's finest real estate.

Established in 2005, the Awards series marks its 18th year in 2023, covering key markets across the region spanning Southeast Asia, East Asia, South Asia and Oceania, with exclusive gala dinners and awards ceremonies in 10 countries – the most anticipated property event of the year.

Country Winners of the region then come together at the annual Grand Final, the highlight of the region's real estate calendar, which brings together the finest developers from each market to compete for the 'Best in Asia' honours.

The Awards series has an unparalleled reputation for being credible, fair and transparent, with an independent judging body, which comprises luminaries representing all real estate sectors, and a trusted awards supervisor in every market, audited by HLB.

Simply, the PropertyGuru Asia Property Awards is the Gold Standard in Asian real estate.





The most
exclusive
real estate events
of the year
celebrating
the industry's
achievements
and biggest
successes



The Road to Gold

1. NOMINATIONS

Visit asiapropertyawards.com/nominations to check which categories your project is eligible to enter. There's no entry limit – nominate as many deserving projects as you can!

2. SUBMISSIONS

Be sure to make it official – as an authorised representative of the company, you must complete the online entry form before the deadline via awardentrysystem.com/register

3. JUDGING PROCESS

An independent panel of experts in real estate, architecture, design and related industries will discuss, debate and agree on the merits of each project in the presence of our trusted awards supervisor.

5. THE SHORTLIST

The judges will choose the final shortlist, which will be revealed to the public via an announcement on asiapropertyawards.com

4. SITE INSPECTION

After deliberations, a long list of projects is selected for a 3- to 5-person group of judges to visit and meet with your senior executives for a detailed inspection

6. GLOBAL SUMMIT

Meet global experts, industry shakers and thought leaders at the annual PropertyGuru Asia Real Estate Summit

7. THE GALA DINNER

Block your calendar for the glitzy black-tie gala dinner and awards ceremony where all will be revealed

8. THE GRAND FINAL

Get a chance to represent your country at the regional grand final and receive a 'Best in Asia' award, in addition to your country honours

Exclusive Gala Dinner & Presentation Ceremony



PropertyGuru Week



PropertyGuru Week





PropertyGuru Asia Property Awards

PropertyGuru is Southeast Asia's leading¹ PropTech company, and the preferred destination for over 41 million property seekers² to connect with more than 63,000 agents³ monthly to find their dream home. PropertyGuru empowers property seekers with more than 3.2 million real estate listings⁵, in-depth insights, and solutions that enable them to make confident property decisions across Singapore, Malaysia, Thailand, Indonesia, and Vietnam.

PropertyGuru.com.sg was launched in Singapore in 2007 and since then PropertyGuru Group has made the property journey a transparent one for property seekers in Southeast Asia. In the last 15 years, PropertyGuru has grown into a high-growth PropTech company with a robust portfolio of leading property marketplaces across its core markets; award-winning mobile apps; mortgage marketplace, PropertyGuru Finance; and a host of enterprise solutions now under PropertyGuru For Business, including a high-quality developer sales enablement platform, FastKey, DataSense, ValueNet, Awards, events and publications across Asia.

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¹ Based on SimilarWeb data between July 2022 and December 2022.

² Based on Google Analytics data between July 2022 and December 2022.

³ Based on data between July 2022 and December 2022

⁴ Based on SimilarWeb data between July 2022 and December 2022.

⁵ Based on data between July 2022 and December 2022.

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Co-hosted by APAA & AMBC
Professional Workshop



AUSTRALASIA
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CAPITAL INFLOW INTO THE AUSTRALIAN REAL ESTATE MARKET

Date & Time : 26/07 Wednesday 18:30 – 21:00

Location: CBRE, Level 34/8 Exhibition St

Event Sponsor



CBRE

Partners

CBRE Investment
Management



Westpac

IDA
Capital | Capability | Opportunity

Speakers



Sandy Padilla

APAC Head of Research
at CBRE Investment
Management



Anthony Watkins

Regional General Manager
at Westpac



Adam Kaye

Managing Director at IDA



Josh Chye

Partner at HLB Mann Judd

Our Panellist

Sandy Padilla

CBRE Investment Management
APAC Head of Research

APAA & AMBC Professional Workshop:
Capital Inflow into the Australian Real Estate Market



CBRE Investment
Management

Our Panellist

Anthony Watkins

Westpac
Regional General Manager



Westpac

APAA & AMBC Professional Workshop:
Capital Inflow into the Australian Real Estate Market



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PROPERTY UPDATE

Presented by Anthony Watkins

July 2023

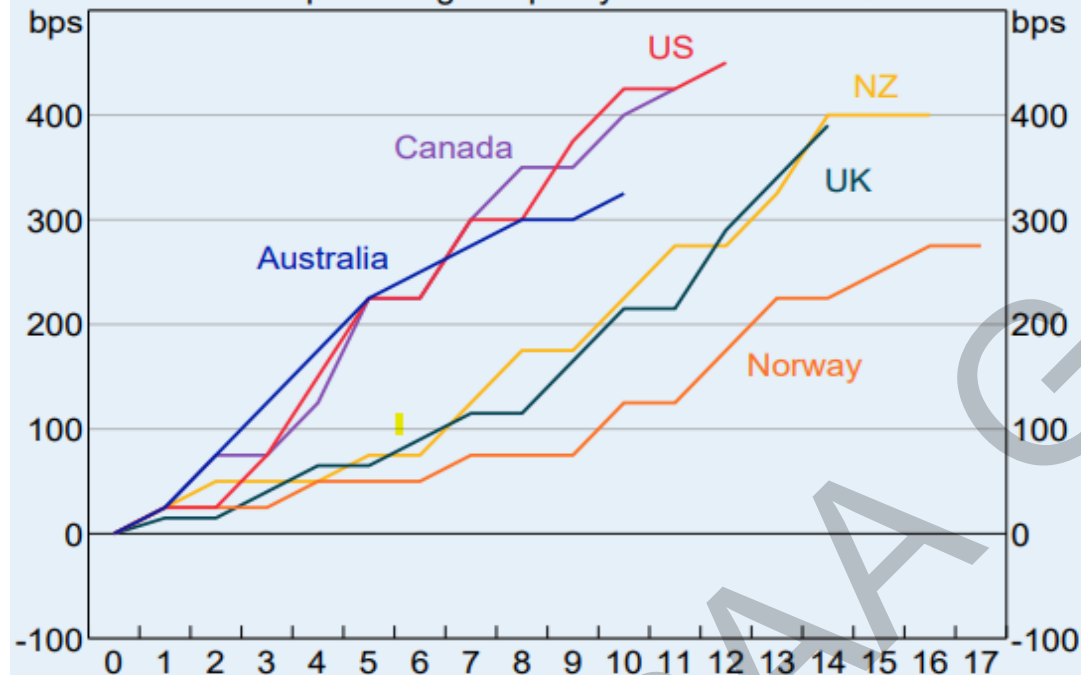


Changes in outstanding mortgage rates, higher here than offshore, despite slower policy rate hikes

Graph A.3

Changes in Policy Rates

Month preceding first policy rate increase = 0*



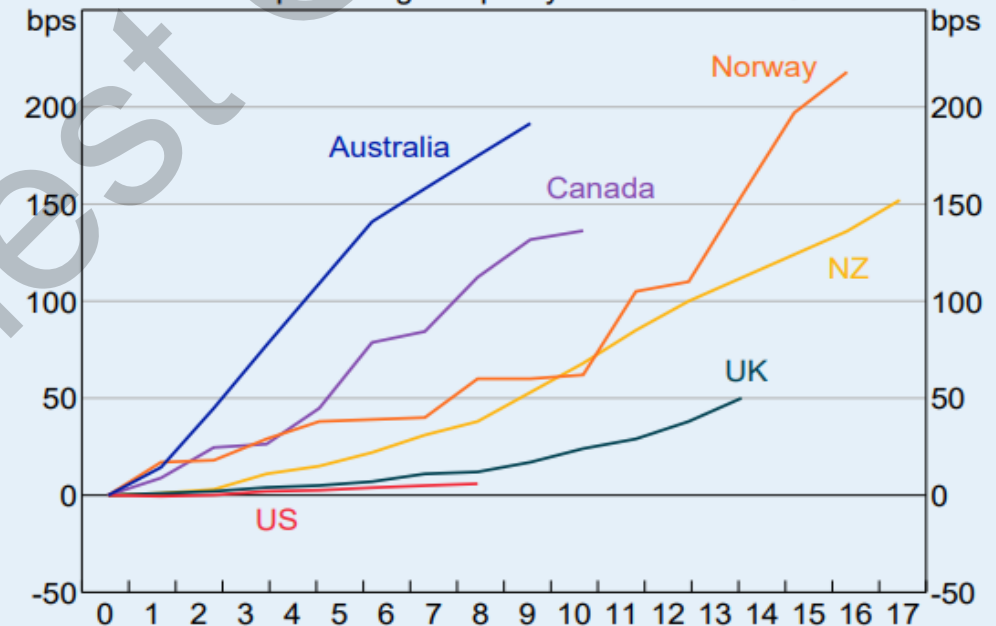
* Cumulative basis point increase in the policy rate relative to the month immediately preceding first policy rate increase since the onset of the pandemic.

Sources: APRA; central banks; RBA

Graph A.4

Changes in Outstanding Mortgage Rates*

Month preceding first policy rate increase = 0**

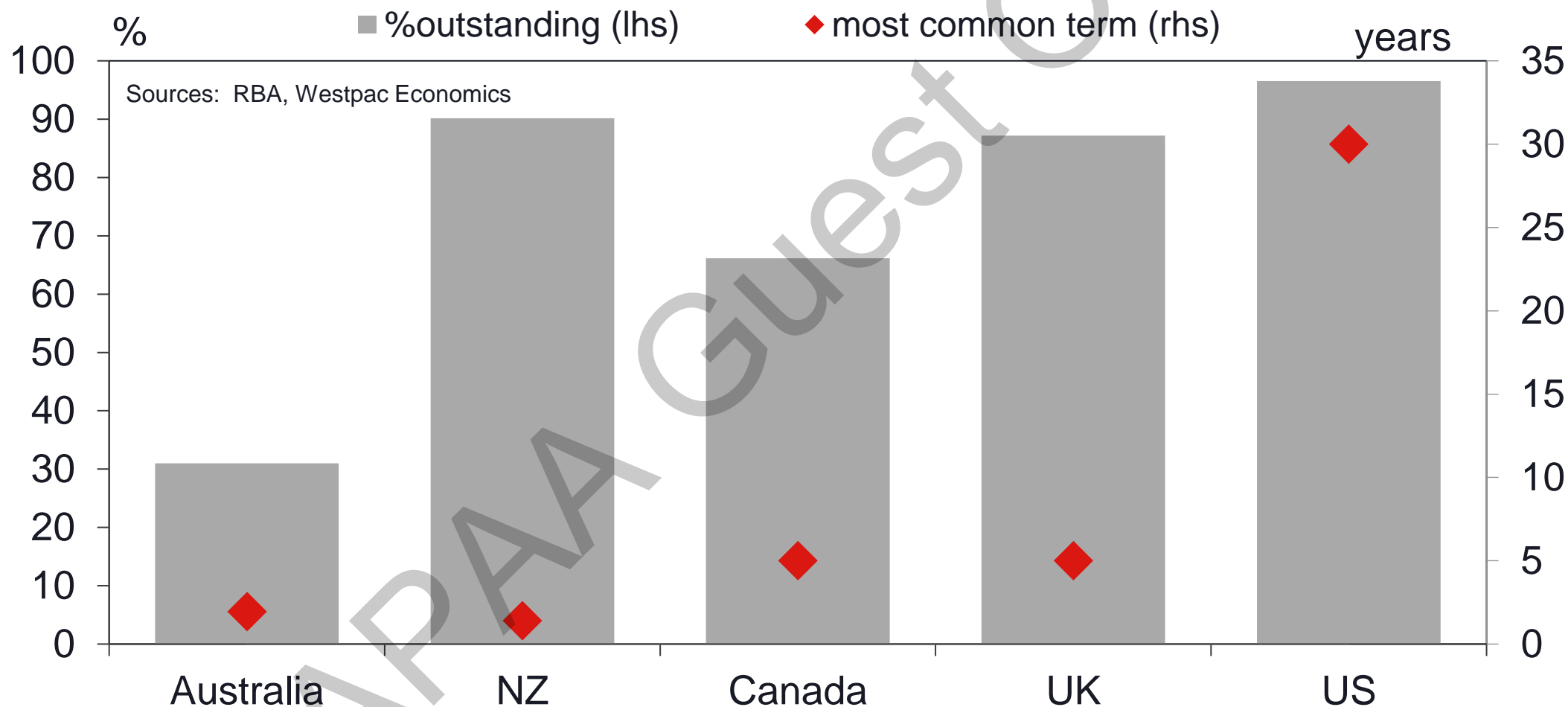


* Data for US to September, Canada to November, and remainder to December.

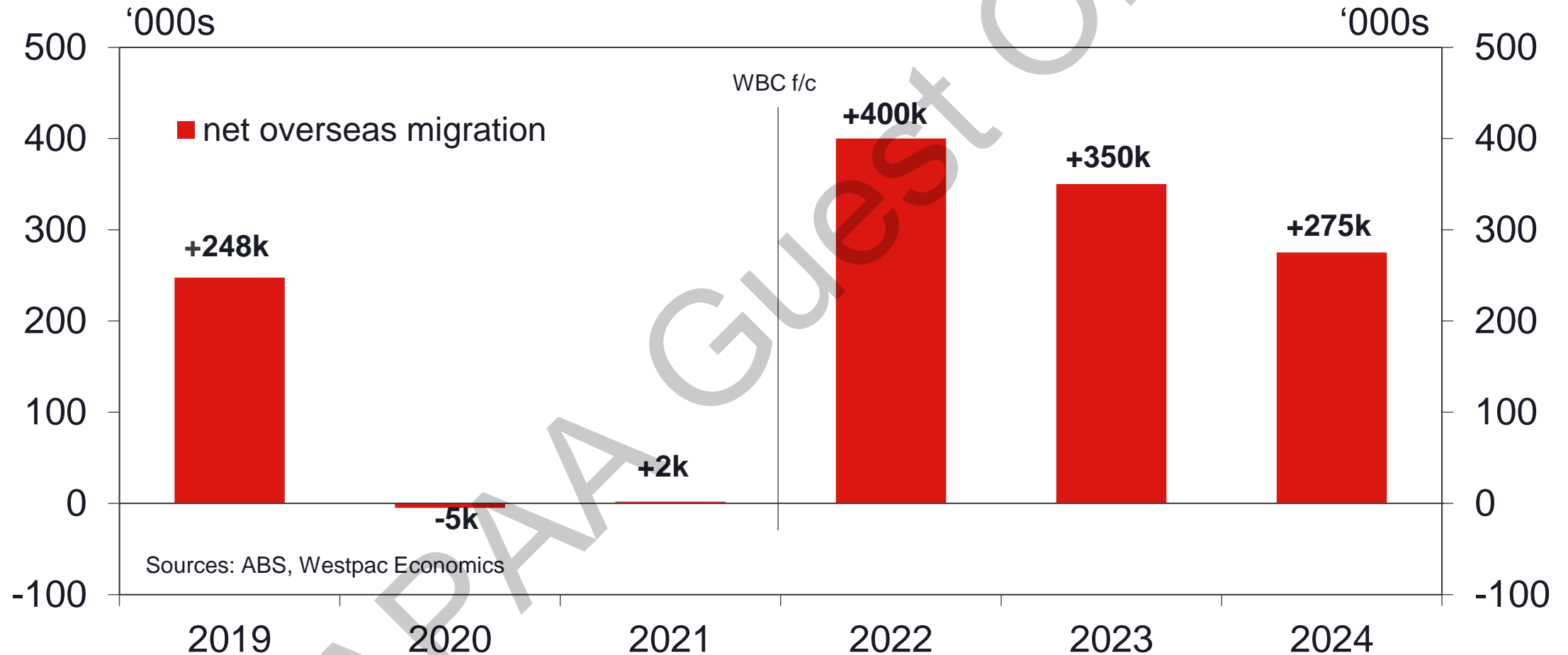
** Cumulative basis point increase in the average outstanding mortgage rate relative to the month immediately preceding first policy rate increase since the onset of the pandemic.

Sources: APRA; central banks; RBA

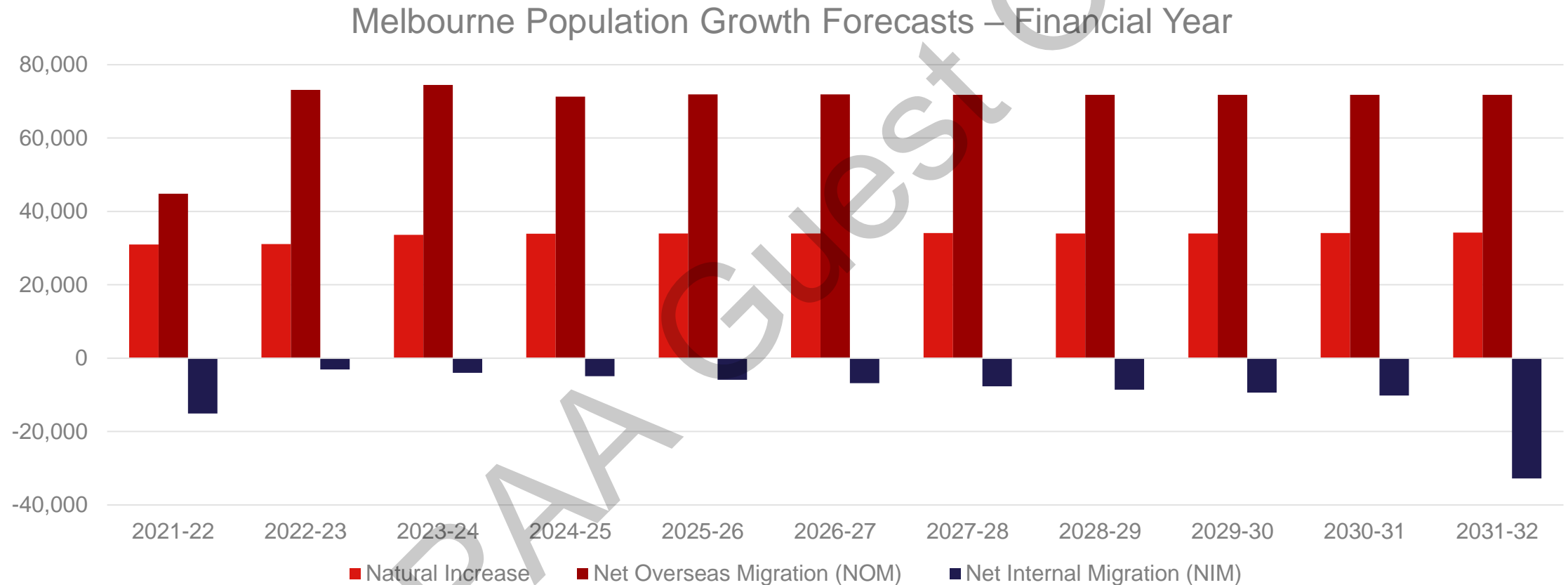
Largely because fixed rate share in Australia is low



Net migration surge to lead a quick recovery



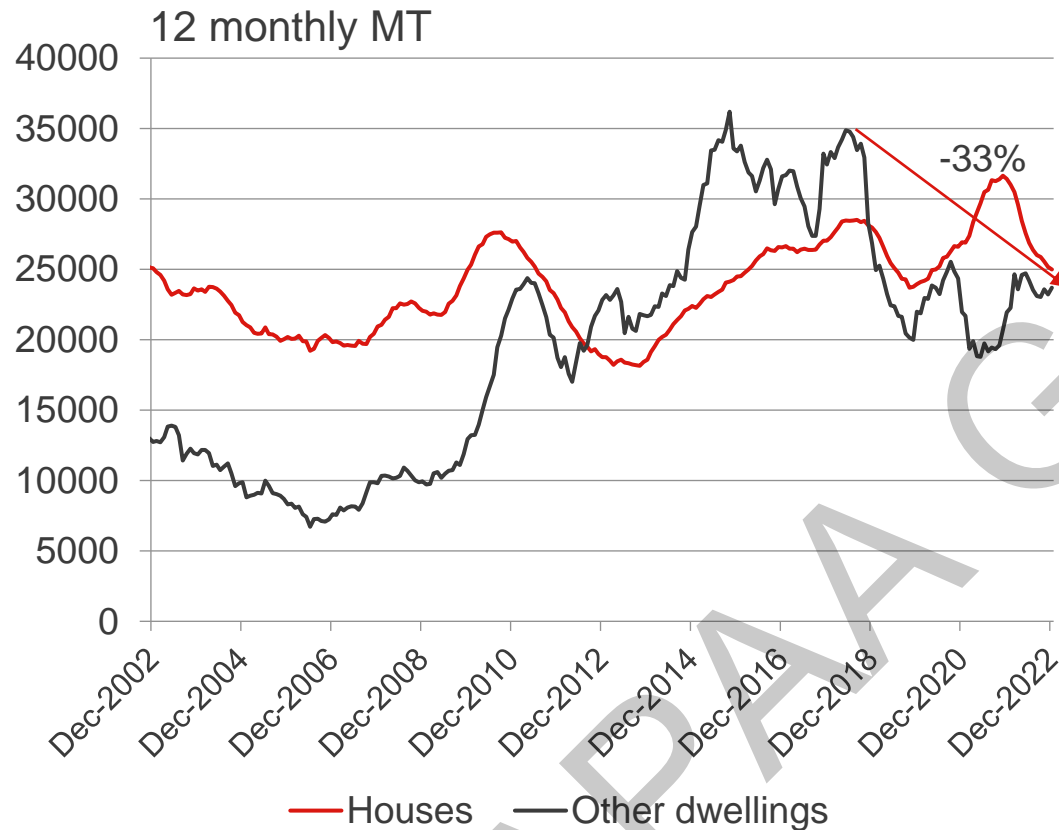
Population Growth to recover – 89K in 2022/23, 102Kpa thereafter



Source: Centre For Population – Australian Government

Other dwelling approvals are at 2014 levels, houses coming off HomeBuilder

Dwellings Approvals - Melbourne



Inner Melbourne high rise – at Q4 2022



Source: ABS/JLL

Residential vacancy very low and rents surged in 2022. Growth rate has eased but little new investor supply coming through

Trends by sub market within each city vary

Metropolitan Rental Vacancy Rate (Source: SQM)

| | Sydney | Melb | Brisbane | Adelaide | Perth | Canberra |
|-----------------|--------------|---------------|---------------|---------------|--------------|--------------|
| April 2020 | 3.9% | 2.8% | 2.8% | 1.2% | 2.3% | 1.2% |
| April 2021 | 3.1% | 4.0% | 1.4% | 0.7% | 0.9% | 0.7% |
| June 2023 | 1.7% | 1.3% | 1.0% | 0.6% | 0.6% | 2.1% |
| Peak since 2005 | 5/20 4.0% | 12/20 4.7% | 12/16 4.1% | 12/16 2.1% | 7/16 5.5% | 4/14 2.4% |

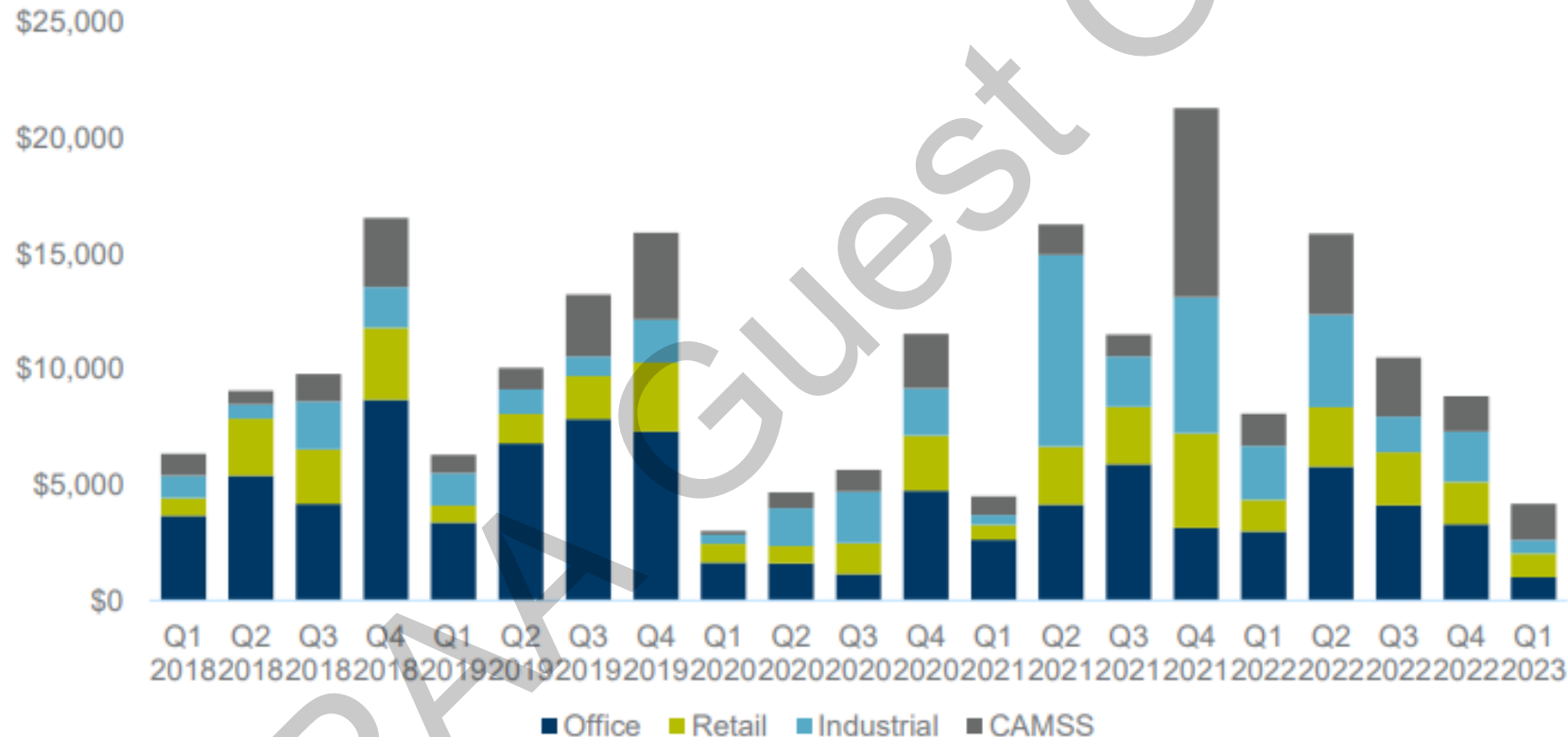
SQM asking rental value series

Capital Cities – 2 bed units

| Change to June 2023 | Sydney | Melb | Brisbane | Adelaide | Perth | Canberra |
|---------------------|--------|-------|----------|----------|-------|----------|
| Quarter | 0.4% | 1.1% | 4.4% | 7.0% | 0.7% | -4.3% |
| Year | 26.1% | 18.4% | 18.7% | 14.7% | 18.2% | -3.9% |

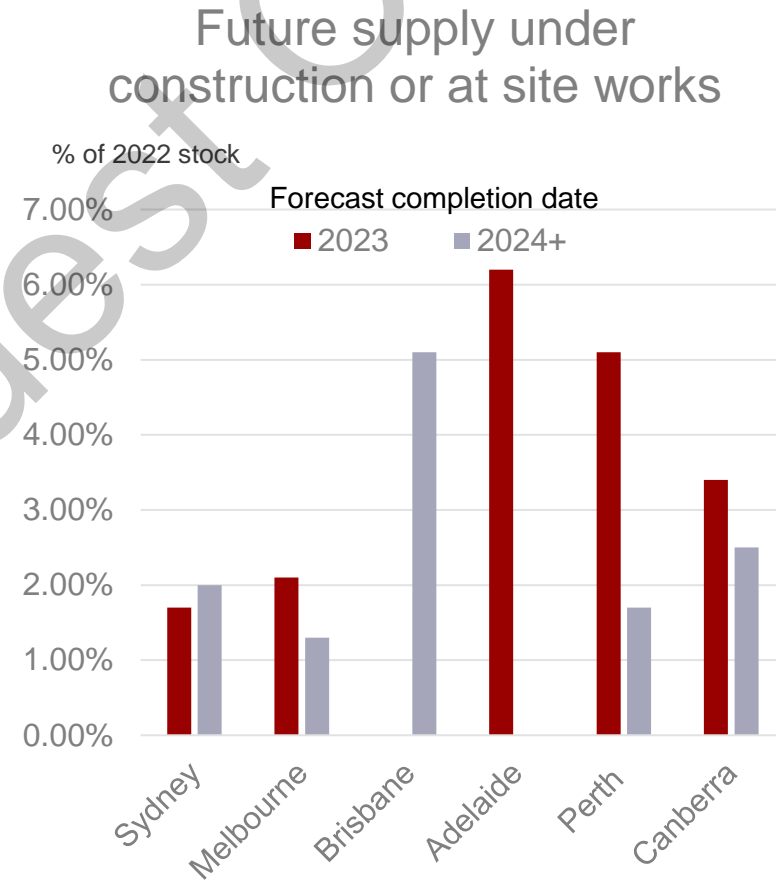
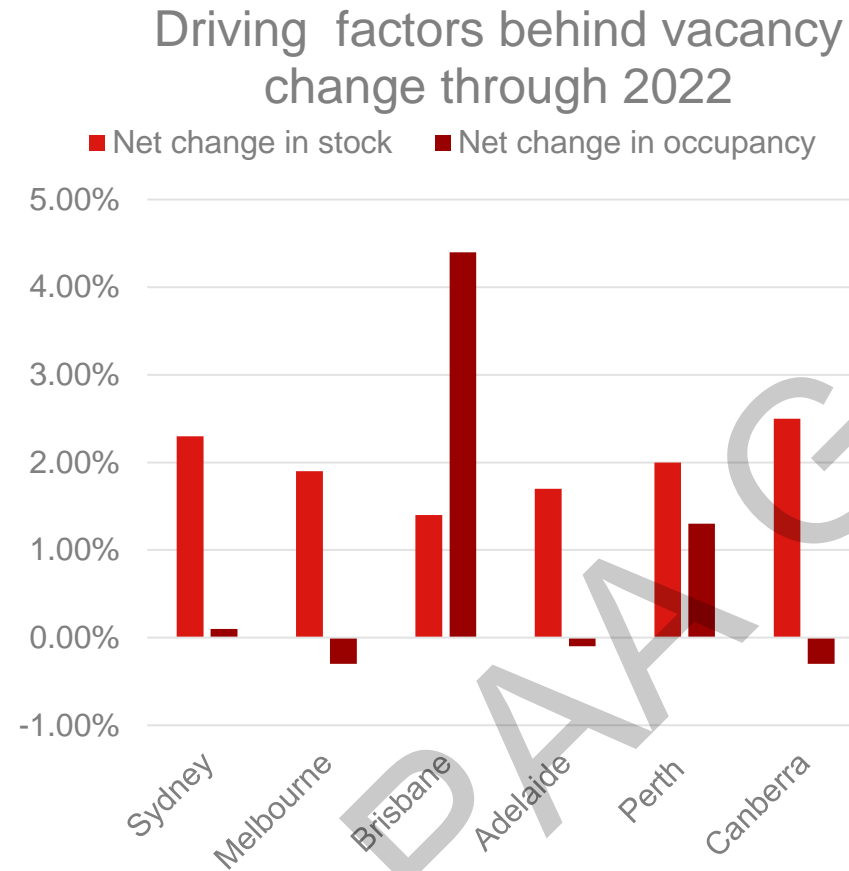
Following weakest Q4 since 2014/15, Q1 transactions slowed to weakest levels since 2020. Expect that weakness continued in Q2 2023.

QUARTERLY COMMERCIAL REAL ESTATE INVESTMENT VOLUME (AUDm)



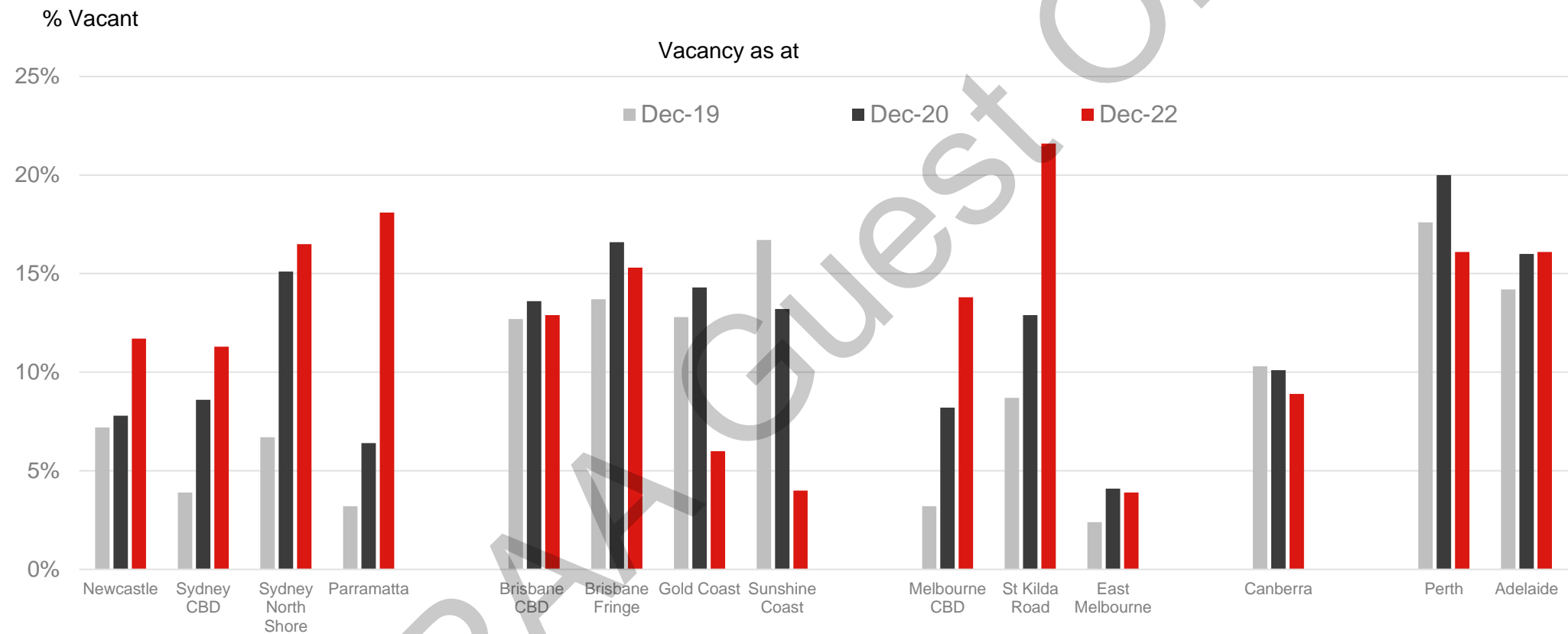
Source: Real Capital Analytics; Cushman & Wakefield

Office vacancy was lifted by higher supply in most, with only Brisbane exceeding supply. More supply to come



Source: PCA OMR 2/2023

Office vacancy impacted by COVID first then supply, SEQ faring well

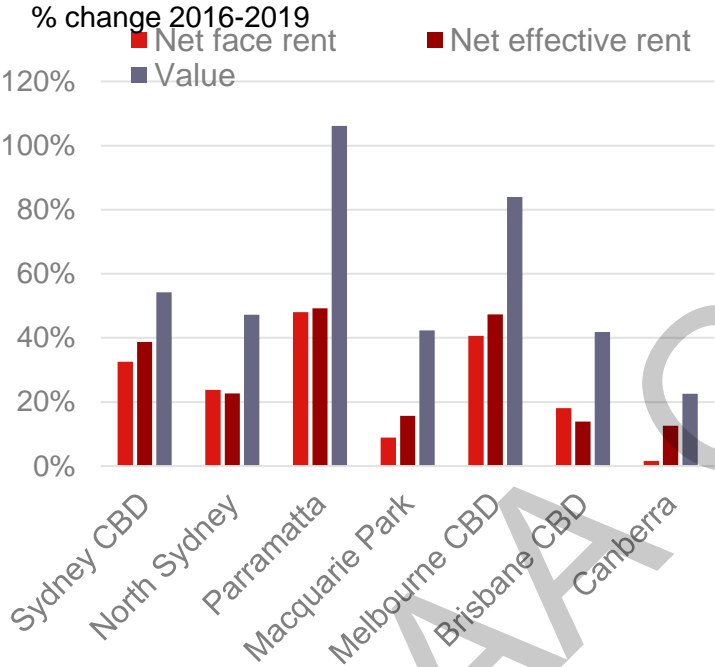


Source: PCA OMR February 2023



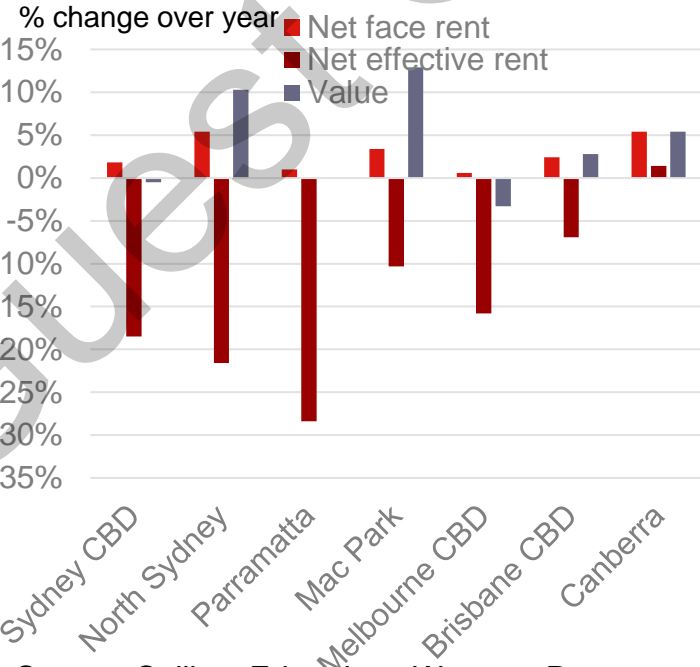
Changes in B grade office metrics – 2016 to 2022

Eastern seaboard markets surging to 2019



Source: Colliers Edge data, Westpac Property

Face rents and values yet to reflect weakening vacancy and rising incentives in 2020-22



Source: Colliers Edge data, Westpac Property

B grade office vacancy

| | Jan 20 | Jan 23 |
|---------|--------|--------|
| Syd | 5.2% | 10.6% |
| N Shore | 7.6% | 27.8% |
| Mac P | 5.4% | 14.3% |
| Parra | 3.4% | 22.8% |
| Mel | 6.4% | 20.8% |
| Bris | 14.3% | 9.5% |
| Can | 12.3% | 5.9% |

Source: PCA OMR 2/23

Slow return to those offices still paying rent – how much is needed?

PCA occupancy survey – return to office average

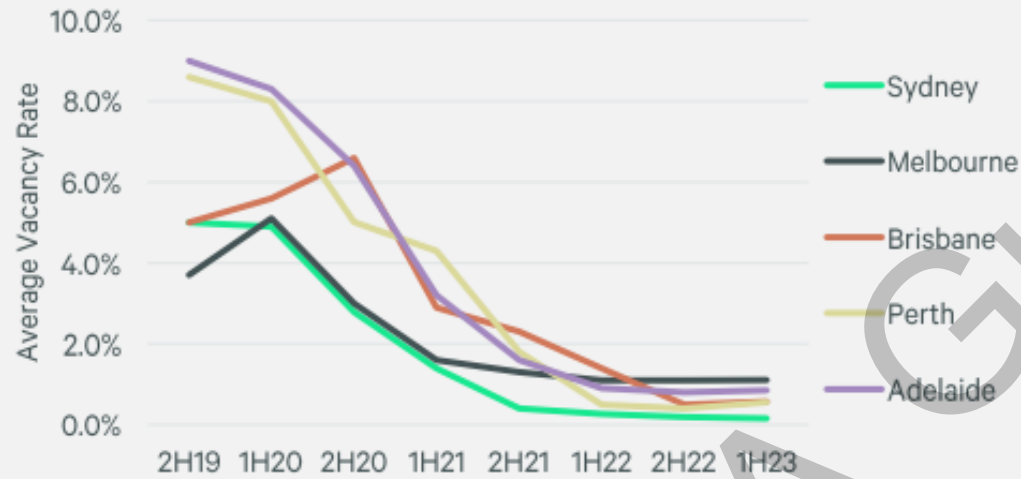
Office occupancy as a percentage by CBD

| Market | Canberra | Melbourne CBD | Sydney CBD | Brisbane CBD | Adelaide CBD | Perth CBD |
|---------------|------------|---------------|------------|--------------|--------------|------------|
| Sep-22 | 54% | 41% | 52% | 70% | 78% | 76% |
| Oct-22 | 57% | 45% | 58% | 64% | 76% | 78% |
| Nov-22 | 52% | 57% | 59% | 67% | 74% | 80% |
| Jan-23 | 28% | 28% | 49% | 53% | 67% | 69% |
| Feb-23 | 46% | 47% | 61% | 74% | 80% | 81% |

Figures are based on responses from Property Council members who own or manage CBD office buildings and cover occupancy for the period from 22-28 February 2023.

Industrial vacancy very low

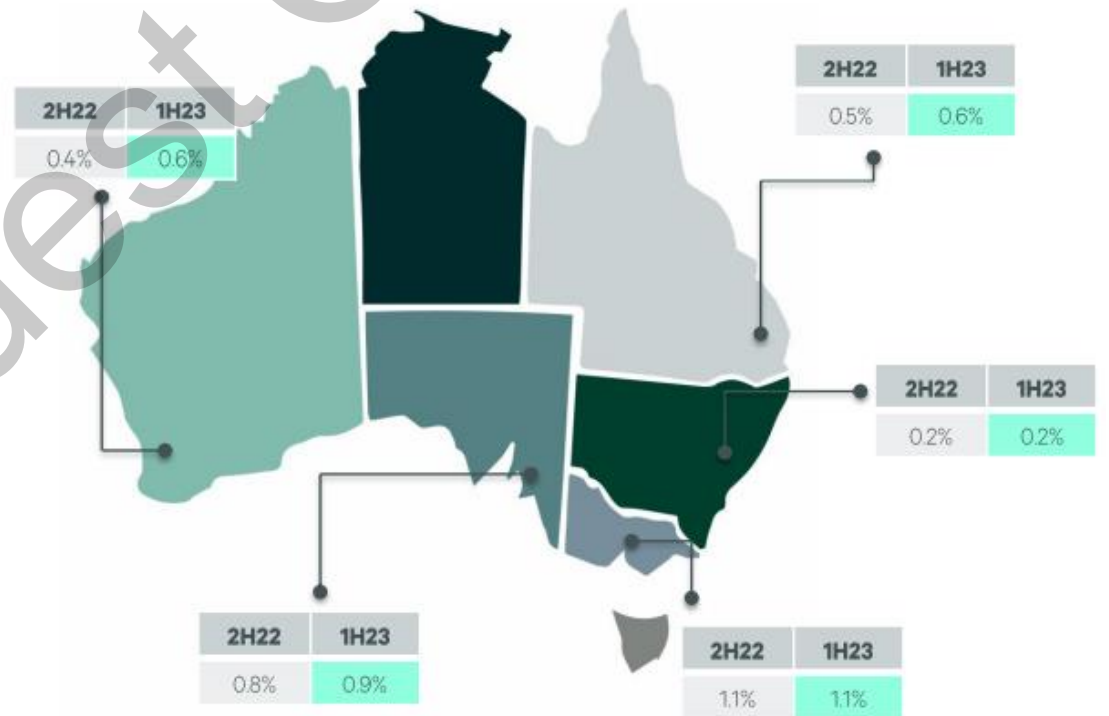
FIGURE 1
Vacancy
Trend by
City



Source: CBRE Research

FIGURE 2

Average Vacancy Rate by State, 1H23 vs. 2H22



To note: reflects building NLA >5,000 sqm in Sydney and Melbourne, and >3,000 sqm in Brisbane, Perth and Adelaide.
Source: CBRE Research

Industrial rents surged due to low vacancy and strong demand.

FIGURE 4
Net Absorption
2H21, 1H22, 2H22,
1H23

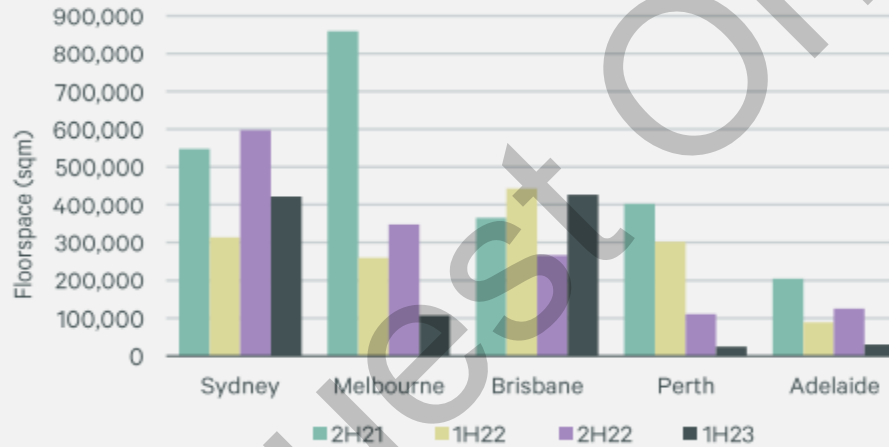
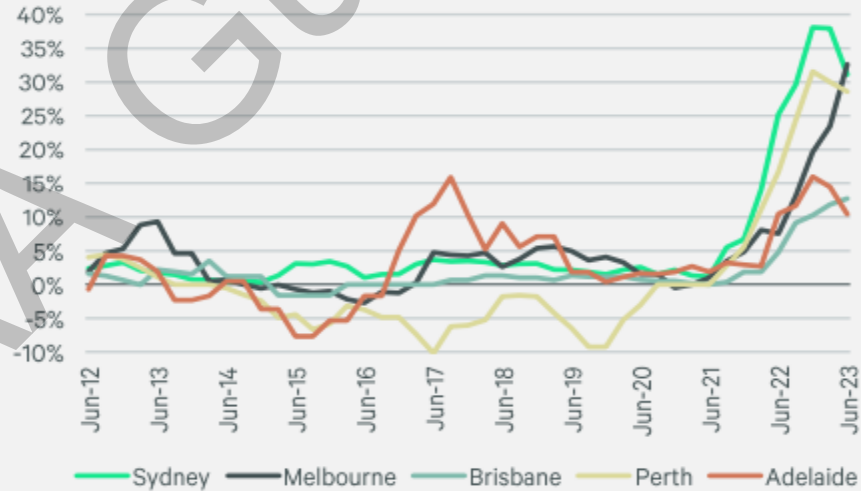
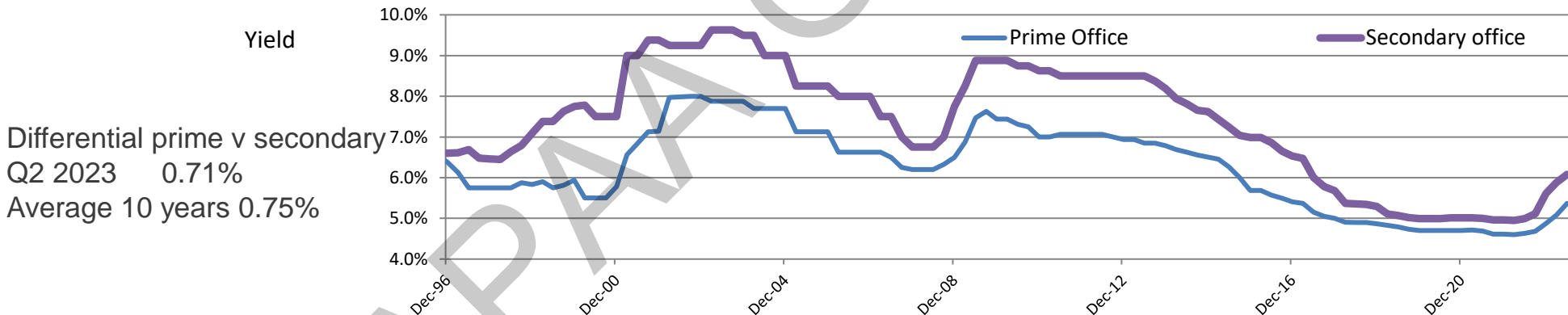
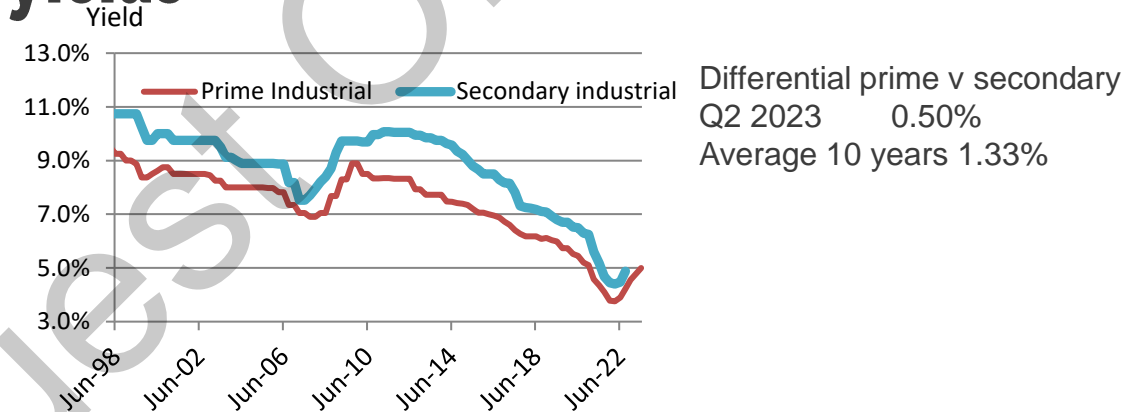
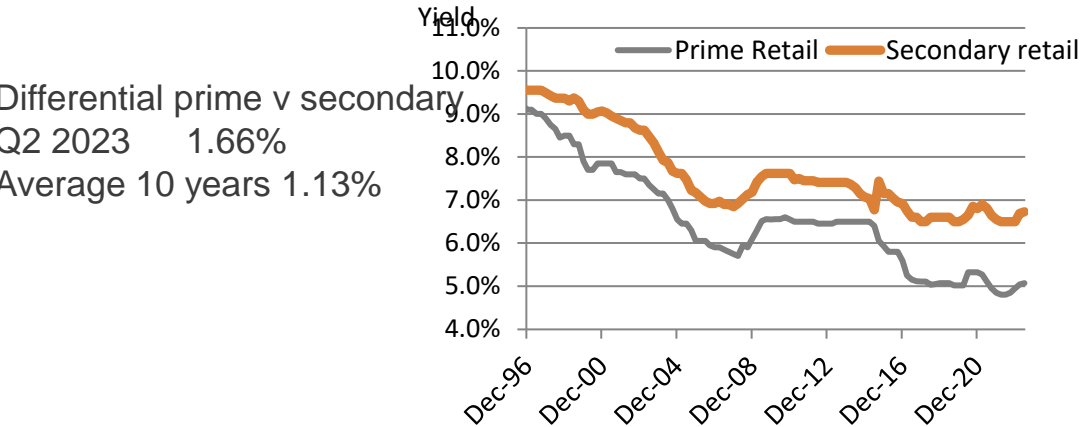


FIGURE 5
Net Face Rental
Growth, Super Prime
Supply-Weighted
Average
(Y-o-Y)



Source: CBRE Research. As at 2Q23.

Weight of Funds has driven secondary yields down, narrowing the gap to prime, particularly in office and industrial . Starting to ease but still too low – Melbourne yields



Source: Colliers, analysis Westpac Property



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Our Panellist

Adam Kaye

Managing Director
IDA

APAA & AMBC Professional Workshop:
Capital Inflow into the Australian Real Estate Market



IDA

Capital | Capability | Opportunity

Capital Inflows into the Australian Real Estate Market

Australasia Property Advisory Association & Australia Malaysia Business Council

July 2023

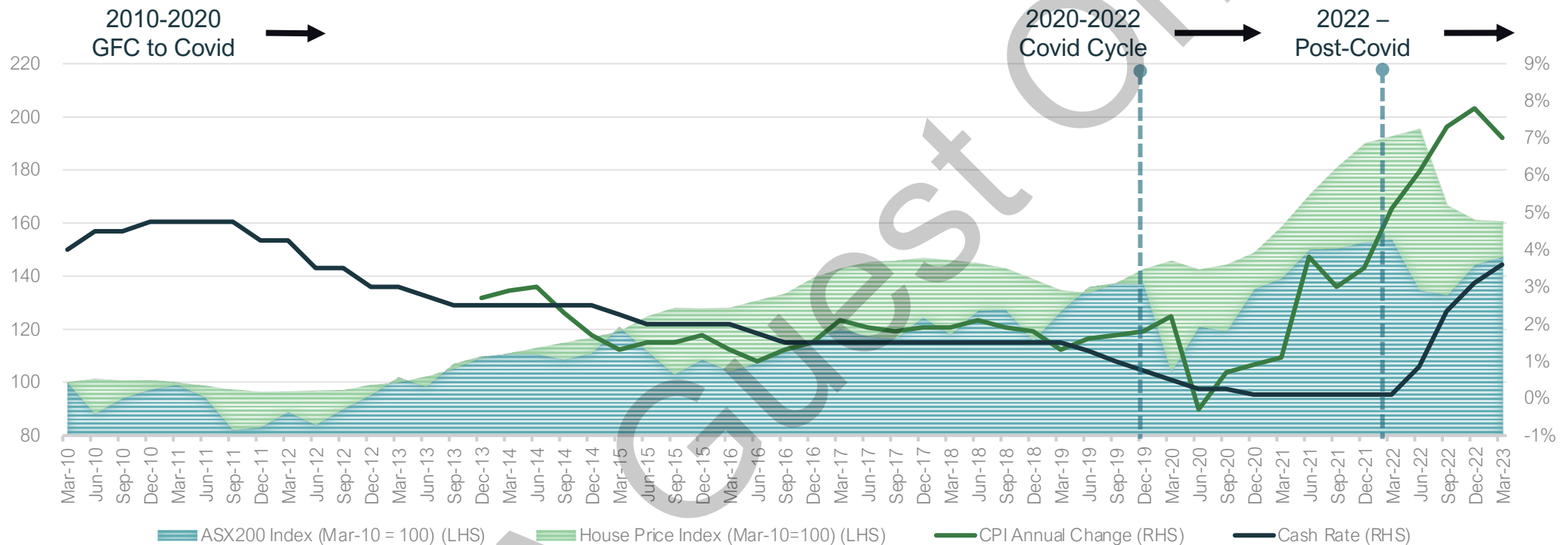


ida.com.au

Contents

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- 2 — The Money Cycle: Where We Are
- 3 — The Economic Cycle: Where We Are Going
- 4 — Macro Drivers for Australian Real Estate
- 5 — Capital Allocation
- 6 — Growth in ESG Lending & Investment
- 7 — About IDA

The Money Cycle: Where We've Come From



GFC to Covid

- Accommodative monetary, regulatory and fiscal policy settings
- Favourable/benign investment conditions across most sectors

Covid Cycle

- Rapid injection of extreme liquidity to prevent wholesale economic collapse
- Rapid asset price inflation eventually making way to inflation in goods and services

Post Covid

- Aggressive rate tightening
- Heightened geopolitical tension & "protectionism"
- Emergent 'High-cost, low-growth' economic cycle

4.10%

RBA Cash Rate

(Apr-22 0.1%)

↑ 400bps

3.888%

US 10 Yr Treasuries

(Jul-21 0.58%)

↑ 330bps

6.32%

Home Loan
Indicator Rate (3Yr Fixed)

(Jul-21 2.19%)

↑ 413bps

28.7%

Proportion of Households
in Mortgage Stress
(Sep-21 15.8% - record low)

↑ 1290bps

4.40%

90-day BBSY

(Sep-21 0.01%)

↑ 339bps

4.14%

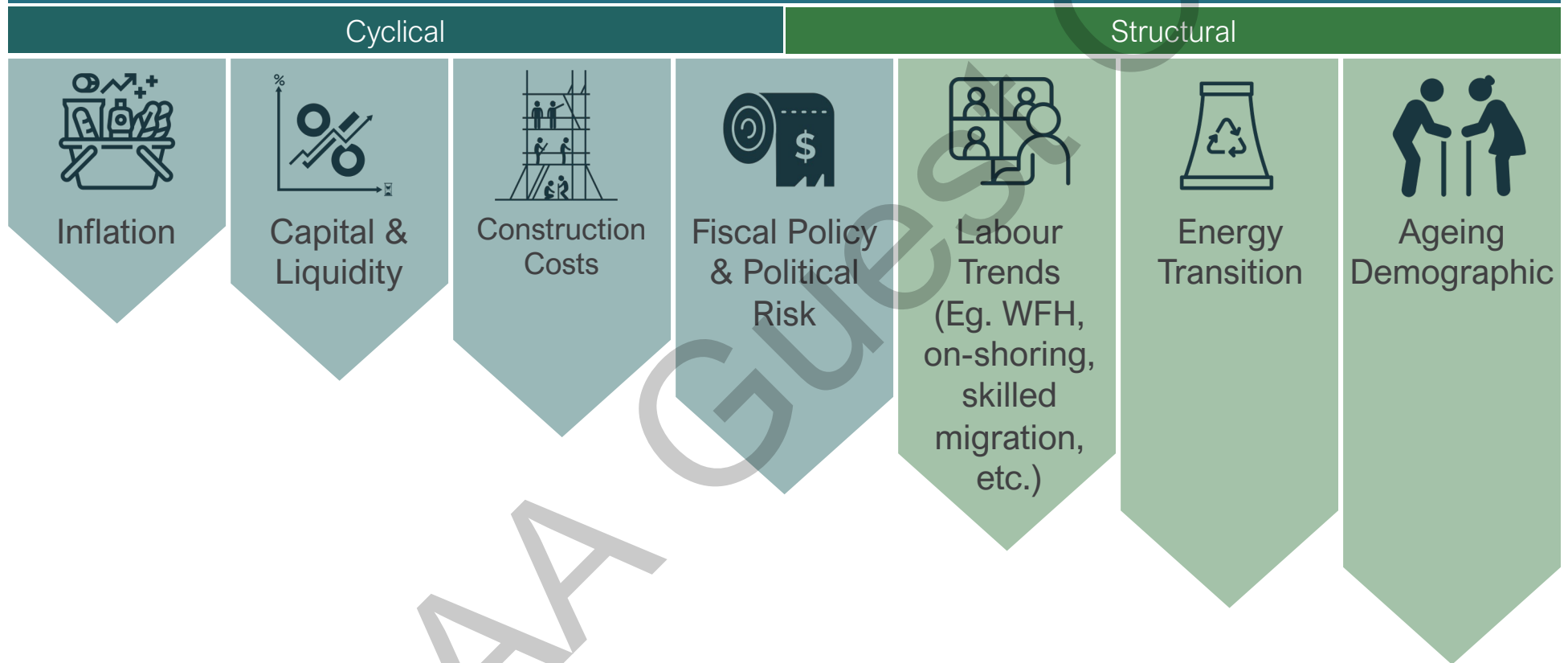
AU Govt Bonds
2 Years

(Sep-21 0.02%)

↑ 412bps

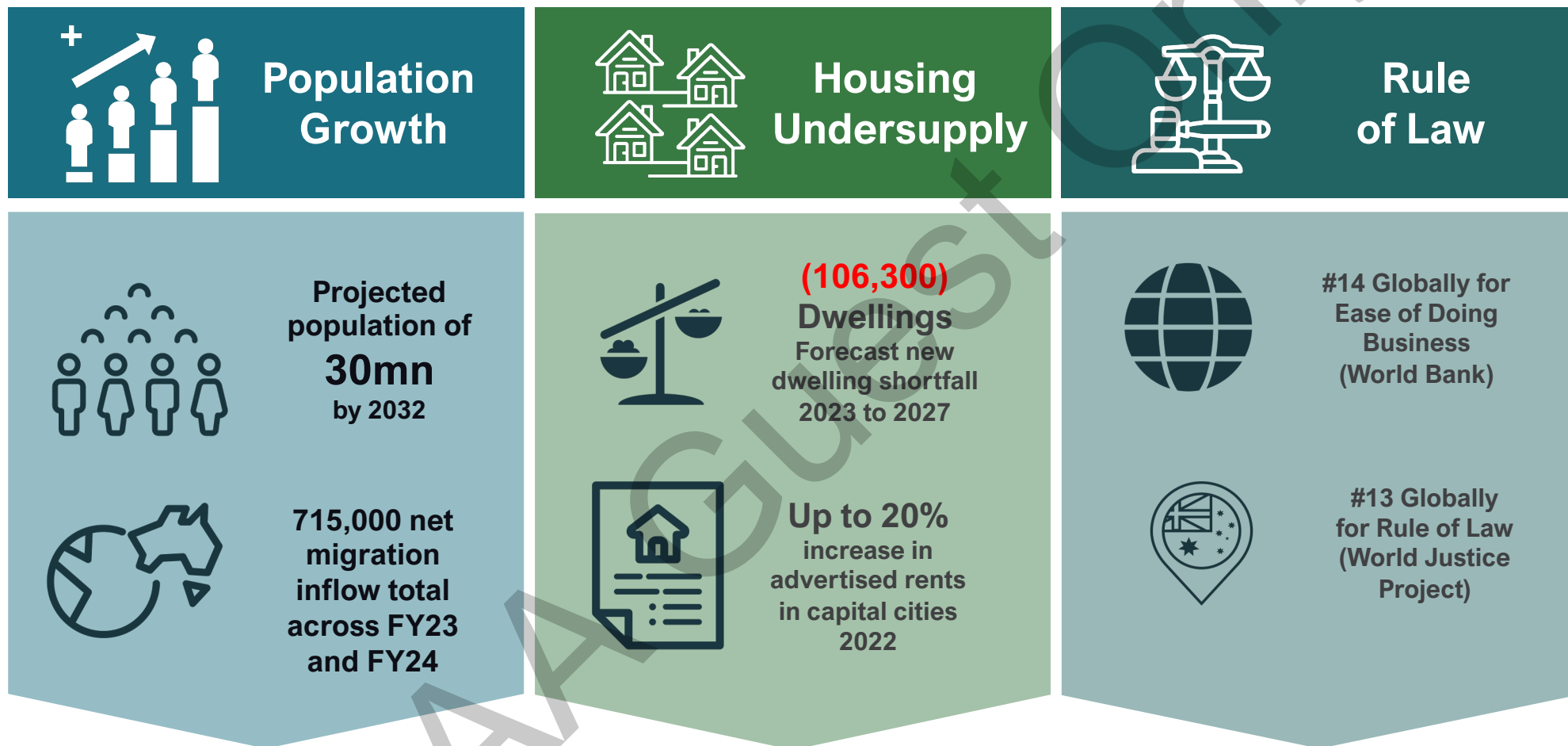
Economic Cycle: Where We Are Going

Australia still represents an attractive investment jurisdiction but challenges abound



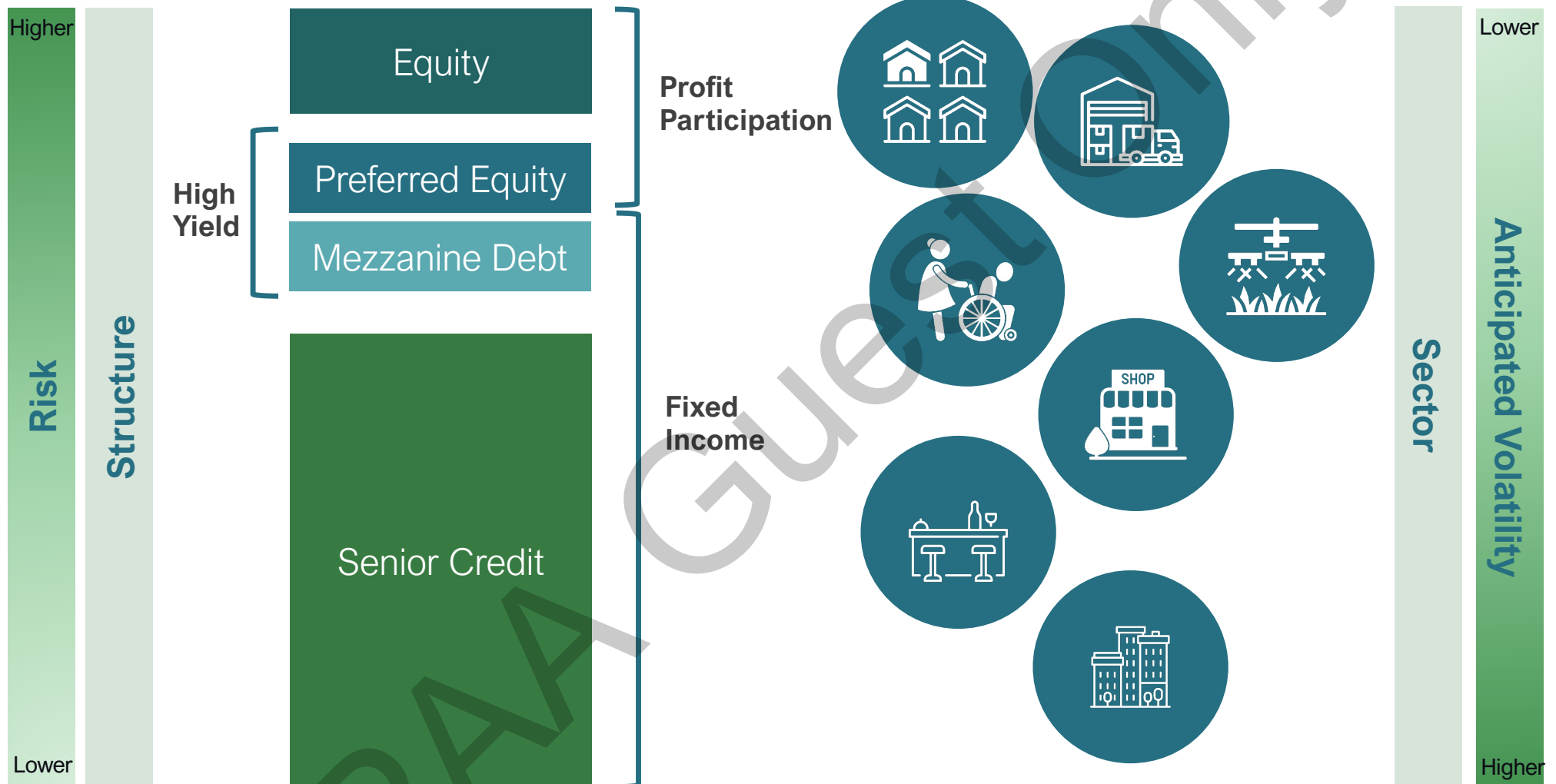
Winners & Losers: Investment performance will not be linear and will not be uniform

Macro Drivers for Australian Real Estate



AU RE – direct & indirect - an attractive sector for Offshore and Domestic Investors

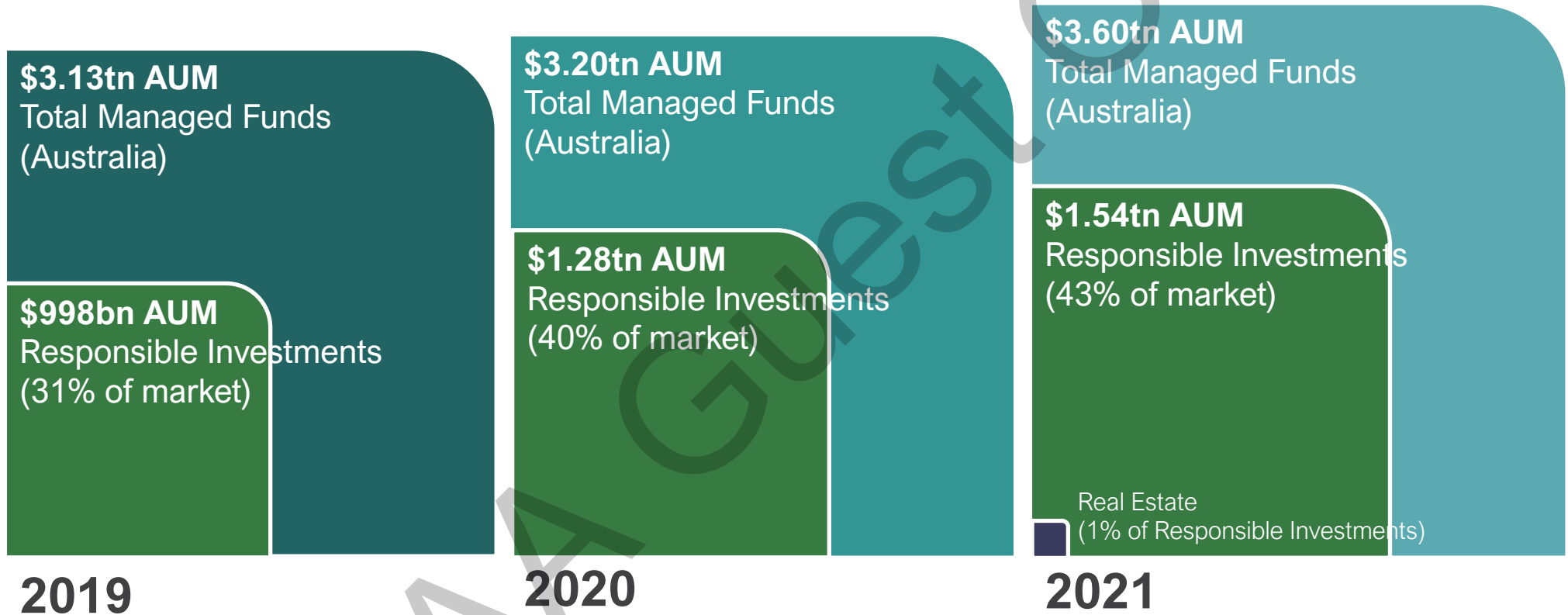
Capital Allocation



Fixed Income: Current short-term volatility poses greater downside risk

High Yield: Longer term fundamentals suggest medium term upside opportunities if correctly priced, termed and resourced.

Growth of ESG Lending & Investing



ABOUT IDA

Established in 2010, IDA is a private real estate credit & investment manager specialising in the funding of medium to large-scale Australian real estate development projects.

Operating across national real estate and private wholesale capital markets, IDA is a professional investment management platform providing access to attractive real estate-backed investments and intelligent, flexible and efficient capital solutions for the middle-market development sector.

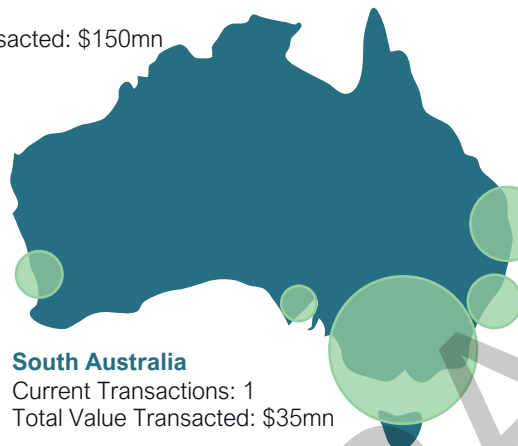
Founded on core values of trust, reliability, humility and respect, and a firm belief in the principle that successful relationships have their foundations in shared values and a common purpose, IDA takes a proprietary approach alongside our valued development and co-investment clients.

Under the day-to-day management and direction of co-founders and principals, Adam Kaye, Robbie Fallon and Jeremy Urbach, IDA employs a first-class team of investment professionals with decades of relevant market and sectoral experience in real estate, finance, investment and development.

As a business which has exercised considerable scrutiny, patience and discipline in the creation of an enviable 13yr investment track record, IDA retains the same culture of scrutiny, patience and discipline in the ongoing maintenance of our performance track record as was so crucial to its creation in the first place.

Western Australia

Investments: 1
Total Value Transacted: \$150mn



South-East Queensland

Current Transactions: 3
Total Value Transacted: \$960mn

New South Wales

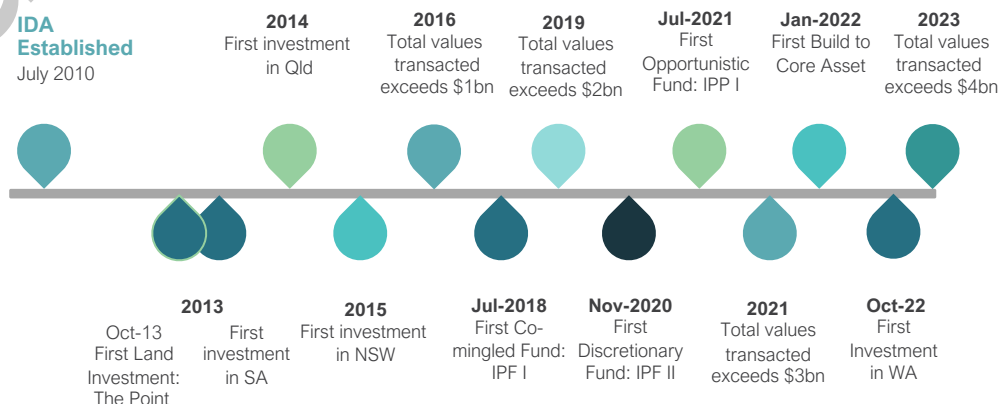
Current Transactions: 4
Total Value Transacted: \$505mn

South Australia

Current Transactions: 1
Total Value Transacted: \$35mn

Victoria

Melbourne Headquarters: 15 FTE
Current Transactions: 16
Total Value Transacted: \$2,940mn



Important Notice

The information contained in this presentation is for informational purposes only and should not be considered as financial or professional advice or solicitation to buy or enter into any financial products or engage in any investment activity. The content is based on the knowledge available as at 25 July 2023.

Any reliance you place on the information provided is at your own risk. Always seek professional advice tailored to your specific circumstances before engaging in any investment activities. No representations or warranties of any kind, whether express or implied, are given about the accuracy, completeness, or suitability of the information. Past performance of any product described is not a reliance indicator of future performance.

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Our Moderator

Josh Chye

HLB Mann Judd
Partner



APAA Professional Workshop:
Capital Inflow into the Australian Real Estate Market





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