

Institutional Real Estate Americas

The investor-focused global real estate publication

H1 2018 Editorial Calendar

January

New year, new challenges

What does 2018 hold in store for investors? Commercial real estate fundamentals remain sound and prices are going up, but the market appears headed for an inflection point. As we look ahead to 2018, where are the opportunities? And where are the challenges?

Development cycles

There has been a late-cycle supply increase in certain U.S. markets. Are property investors encountering a threat of new product supply? Which property types? Which markets? Will current development projects be completed in time to catch tenant demand? Or is the market already shifting?

Ad reservations due: November 10

Ad materials due: December 1

February

Asian core open-end funds

A host of new core open-end funds targeting Asian markets are being launched. In what ways does this suggest investors no longer require a risk premium to move into Asian markets? What strategies are fund managers using for these open-end funds to create a stable cash flow and, ultimately, boost overall portfolio performance?

The real assets allocation

Some institutional investors have grouped their infrastructure and real estate departments under a real assets umbrella. What are the benefits of this tactical allocation? What are the detriments? Will more generalist managers, with broader reach and ability to do both infrastructure and real estate investment, be advantaged versus smaller, specialist managers?

Ad reservations due: December 11

Ad materials due: January 4



March

Co-working together

Co-working is one of the hottest trends in office space. What role is being played by institutional real estate investors? What opportunities exist for investment? How big can the market get? The biggest player, WeWork Cos., has a \$20 billion valuation and 10 million square feet of space under management, with plans to expand globally. But what might happen if the office market softens?

Investing in Europe

From the sovereign debt crisis to Brexit, Europe has seen a wave of upheaval in the wake of the global financial crisis. Where are the genuine opportunities, both geographically and strategically, in Europe? How should Americas-based investors approach the region? And where do the greatest risks lie?

Ad reservations due: January 12

Ad materials due: February 2

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April

Going on sale

What is the future of shopping center investing — near and long term? And how will brick-and-mortar retail property owners confront the changing retail climate? How do online sales, for example, relate to rental and lease structures for omnichannel retailers? What is the impact of established e-commerce brands moving into the brick-and-mortar retail space?

Funding retirements

Baby boomers are retiring at a faster rate than millennials are entering the workforce; what are the implications for the traditional defined-benefit pension plan with respect to funding status and investment return objectives? What will be the effects on capital allocations to real estate? How will LPs solve unfunded/underfunded pension liabilities? And what role might real estate investment play in that solution?

Ad reservations due: February 9

Ad materials due: February 27

May

Built for wellness

In an effort to attract and retain tenants, particularly millennials, property investors are striving to offer amenities to encourage and enhance occupants' well-being. How are investors and their managers adapting to meet changing tenant needs? In what ways are the

issues of tech disruption and sustainable investing playing a role, and how do new wellness standards assist property owners in their efforts?

Core vs. core-plus

As investors move up the risk spectrum in their search for yield, what is the difference between core and core-plus strategies, and what do they mean at this point in the cycle? Is the wave of core-plus funds a fad, or does it represent an enduring investment strategy? With return compression across all asset classes, what are investors' return expectations in the current environment? Does it make sense to target core-plus or value-added strategies at this stage of the market cycle? Is core overvalued or fairly priced?

Ad reservations due: March 14

Ad materials due: April 4

June

Rising interest

The Federal Open Market Committee has signaled a willingness to raise rates even if inflation does not reach its 2 percent policy target. What might be the impact of rising interest rates on real estate valuations and lending? What is the best approach to real estate investing within an increasing interest-rate environment? What does the Fed's normalization of its balance sheet mean for real estate?

Ad reservations due: April 13

Ad materials due: May 2

Note: Publication content is subject to change without notice. The editorial calendar for second half 2018 will be available in March.

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