

What investors want



Today's investors want more information – and easier access to it

People invest in real estate assets expecting to make a return on their investment through periodic distributions and increased asset value. Although that fact has remained largely unchanged over time, some elements of the investment process are evolving. One of the most notable is an increase in demand for timely access to information wherever the investor is, from any device.

Ownership vehicles for real estate investments include partnerships, closed-end and open-ended funds, REITs and more. Regardless of the myriad of complex structures, tax considerations and rules that apply to any particular investment vehicle, investors' priorities stay constant: optimized returns, timely capital solicitations, efficient management of the subscription agreement process, consistent communication across the investment lifecycle, and accurate determination of distributions.

And with property operations affecting asset value, cash flow and distributions, investors not only want the results but what's driving them.



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"Satisfying the demand for prompt access to relevant information "requires the assimilation and distribution of financial and operational data, from the portfolio level to operational aspects of individual properties. Advanced software solutions can perform these and several other operations efficiently and drive better decision-making for investors."



Satisfying Evolving Investor Expectations with a Single Technology Platform

Investors follow their real estate investments' value and income production more closely than in earlier eras when reporting was largely confined to financial performance. A property's value includes day-to-day operational details like rental income, leasing activity, marketing and capital improvements.

The expansion of investor expectations has prompted many investment managers to adopt technology platforms capable of delivering full visibility and access to portfolio performance, along with the ability to evaluate investment

options and select assets most likely to maximize return on investment (ROI).

Paper reports, back-and-forth emails and spreadsheets have been made obsolete, superseded by the online and remote convenience that real estate investors experience in other aspects of their daily lives.

A single connected investment management platform is the technology of choice for real estate investment managers because it creates one source of truth for real estate asset

operational and financial data.

Utilizing a single platform for investment operations gives investors clarity into their holdings and helps identify risks. Such systems can assimilate all property prospecting, preliminary underwriting, rent and expense data, loan abstracts, maturing debt, asset ratings, valuation tracking, occupancy trends and more.

Compiling the data into market analysis and automating electronic distributions are simplified when operational and investment systems are connected in

an end-to-end investment platform. Investors can evaluate their investment metrics, access reports, and understand how a given asset will impact overall investment performance.

An integrated investment management platform also includes a portal that gives investors self-service access to key data and reports. Such a portal, when fully connected, allows for an efficient way to get information to investors.

Value from Enhanced Property-Level Insight

Investors want more detailed information about what is happening at the asset level that is driving the value and returns of their investments. A single source of truth through an integrated solution prevents errors and the manual reconciliation process of keeping disparate systems up to date. This allows teams to focus on delivering full transparency to investors from the investment to asset operations.

The result is faster, better-informed investor decisions. Satisfying tech-savvy, increasingly sophisticated and inquisitive investors requires mitigating risks, optimizing returns and value and making information available when needed.

Investors gain confidence knowing that their partners leverage a comprehensive technology platform to manage all aspects of the investment lifecycle, deliver timely and accurate information and minimize risk.



Successful real estate investment strategies in 2023 and beyond will require advanced connected solutions that automate the entire investment lifecycle for efficient deal tracking, quick capture and execution of new opportunities, and close oversight.

Decision-making tools contained within a single system exceed what investors can achieve with spreadsheets and unconnected platforms.

Thanks for downloading

For more information or any questions on Yardi Investment Management, contact us. We'd love to help!

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