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Our Vision : To be the leading consultancy in commercial and industrial properties

Our Mission: To provide professional, value-added and cost effective business space solutions



Presented by
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Economy

- Singapore GDP : S\$327 billion
- Per Capital Income : S\$63,000 (2011)
- Foreign Reserves : S\$308 billion
- GDP Growth Rate (2012) : Average 1.5% - 2.5%
- Inflation rate : 4.0% (average over 10 years)
- Bank Borrowing Rate : 1.0% - 1.5 % (residential loans)
- Unemployment Rate : 2.3% (2011)
- **Voted No. 1 city with best investment potential**
- Outranks the world as an investment destination after coming in 2nd for 16 consecutive years.



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Rankings

- Top 3 in the world for foreign trade and investment: The Globalisation Index 2011
- The world's easiest place to do business: World Bank Report (2012)
- Top 2 most competitive city in the world: World Economic Forum (2011 - 2012)
- Best business environment in Asia Pacific & the world: EIU report 2011
- Most transparent country in Asia: World IMD
- Asia's best country to work in: World Competitiveness Report 2011 & 2012
- Asia's most network-ready country: Global IT technology

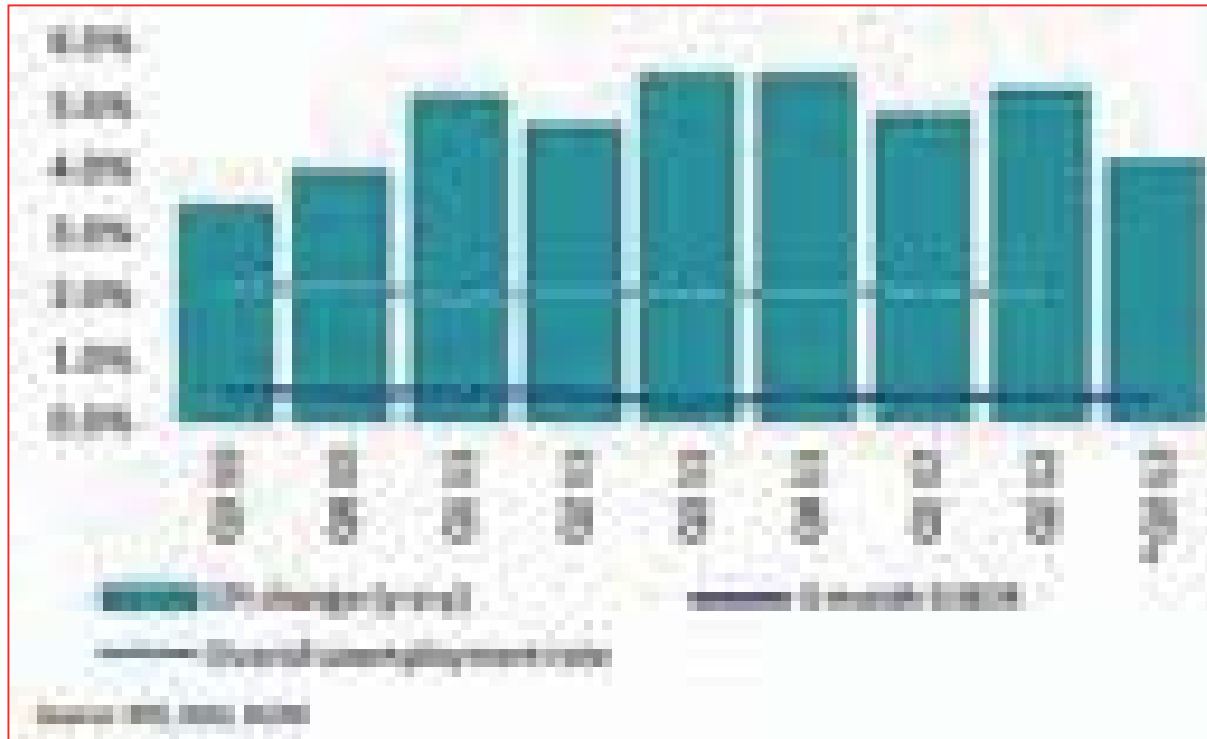
Source : www.edb.gov.sg



India's Inflation/ Interest Rate & Unemployed Rate



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ate Investment Sales

Investment Sales Hits S\$9.1 bn consisting of: -

- *10 residential en-bloc (S\$1.13bn) for 3Q12; (e.g. Thomson view @ S\$590mn & Green lodge @ S\$191.1mn) with the announcement of Thomson MRT line.
- *2 commercial buildings – Robinson Point (S\$284mn @ S\$2,133 psf) & 78 Shenton Way (S\$304mn @ S\$1,686 psf)
- * Strata office sales hits S\$2.1bn with the rest being asset swap deals by Capitaland & Ascott REIT (S\$579mn), NTUC Income purchases 24% stake in Parkway Parade Mall & 50% stake transfer for Nexx for S\$825mn.

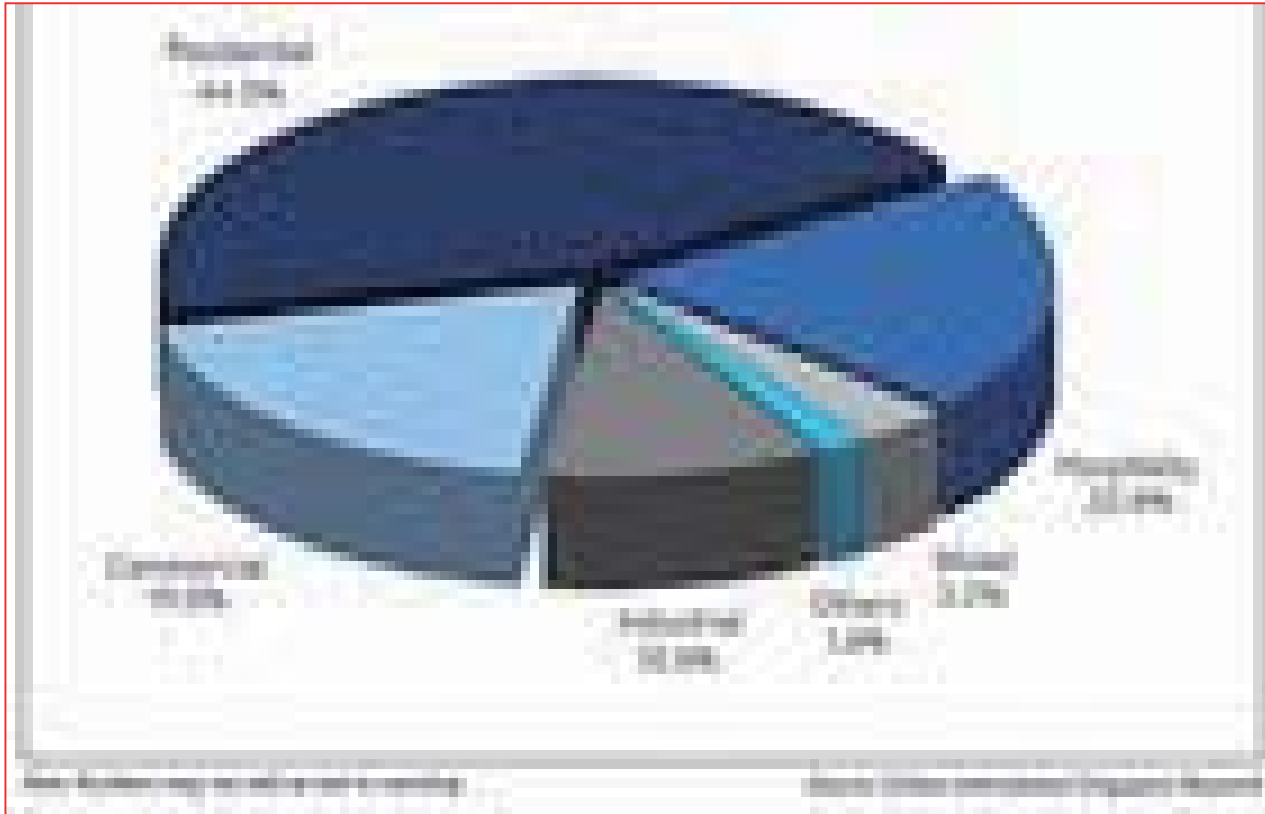


Major Property Investment Transactions, Q3 2012			
Type	Property	Value (S\$)	Buyer
Residential	Thomson View (10 units)	1.13	Thomson View Pte Ltd
Commercial	Robinson Point	284	Robinson Point Pte Ltd
Commercial	78 Shenton Way	304	78 Shenton Way Pte Ltd
Strata Office	Various Office Buildings	2.1	Various Buyers
Other	Asset Swap Deals	579	Capitaland & Ascott REIT

Evolution of Investment Sales Value By Sector (In 3Q 2012)



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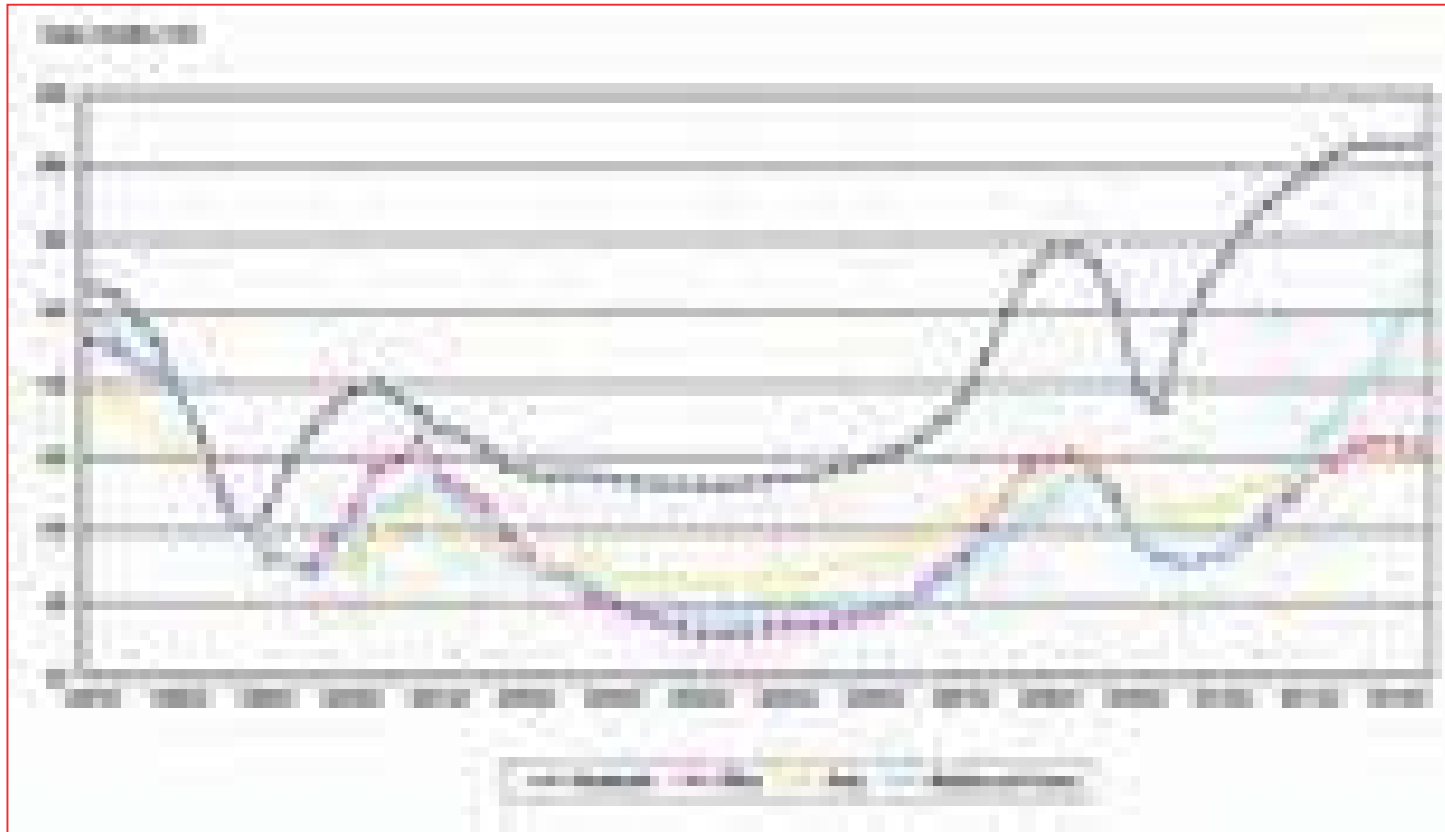


The Real Estate Direction



- Grade A office capital value slip 2% to S\$2,400 psf.
- Prime retail values held firm.
- Prime residential values fell slightly whilst HDB market resale index up 2% in 3Q12.
- Industrial strata sales prices is on the upward trend.
- A 14,000 sqft 2-storey bungalow in Chee Hoon Avenue is being offered at S\$21.5mn @ S\$1,525 psf.

Chart of Property Price Index



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- Office sector remains resilient.
- Grade A office rent fell 2.5% qoq.
- To date rental rate have fell 1.9% to S\$9.8 psf/mth
- Grade B offices contracted 0.6%.
- Qoq to S\$7.17 psf/mth.
- Year to date absorption 1.69mn sqft (vs 10 years' average 1.12 mn).
- Professional and legal services are main demand driver.

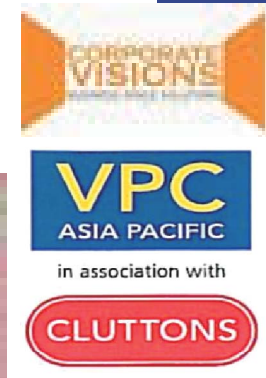


New supplies in 2013:-

- Asia square (782,280 sqft)
- The Metropolis (1.18mn sqft)
- Jem (315,000 sqft)

The table, titled 'Singapore Office Rents', provides a breakdown of rental rates for different office grades. The columns represent the office grade, the current rental rate, and the change in rental rate.

Office Grade	Rental Rate (S\$ psf/mth)	Change (QoQ)
Grade A	9.8	-2.5%
Grade B	7.17	-0.6%



Financial Performance

	REVENUE (RM MILLION)		CHANGE IN REVENUE (%)	
	2014	2013	2014	2013
Group				
Malaysia (Mainland)	14.47	14.24	+1.6%	+1.6%
Shannon Way/Tanjung Pagar	17.88	17.80	+0.4%	+0.4%
Marine City Mall	14.26	14.11	+1.1%	+1.1%
Ceylan Road	18.71	18.63	+0.4%	+0.4%
South Road	17.30	17.30	0%	0%
City Front	17.86	17.38	+2.8%	+2.8%
Suburban	14.52	14.51	+0.1%	+0.1%
Group				
Malaysia (Mainland)	17.71	17.43	+1.6%	+1.6%
Shannon Way/Tanjung Pagar	14.80	14.71	+0.6%	+0.6%
Ceylan Road	17.35	17.35	0%	0%
South Road	18.30	18.30	0%	0%



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Transactions in 2Q2012

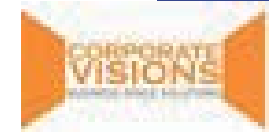
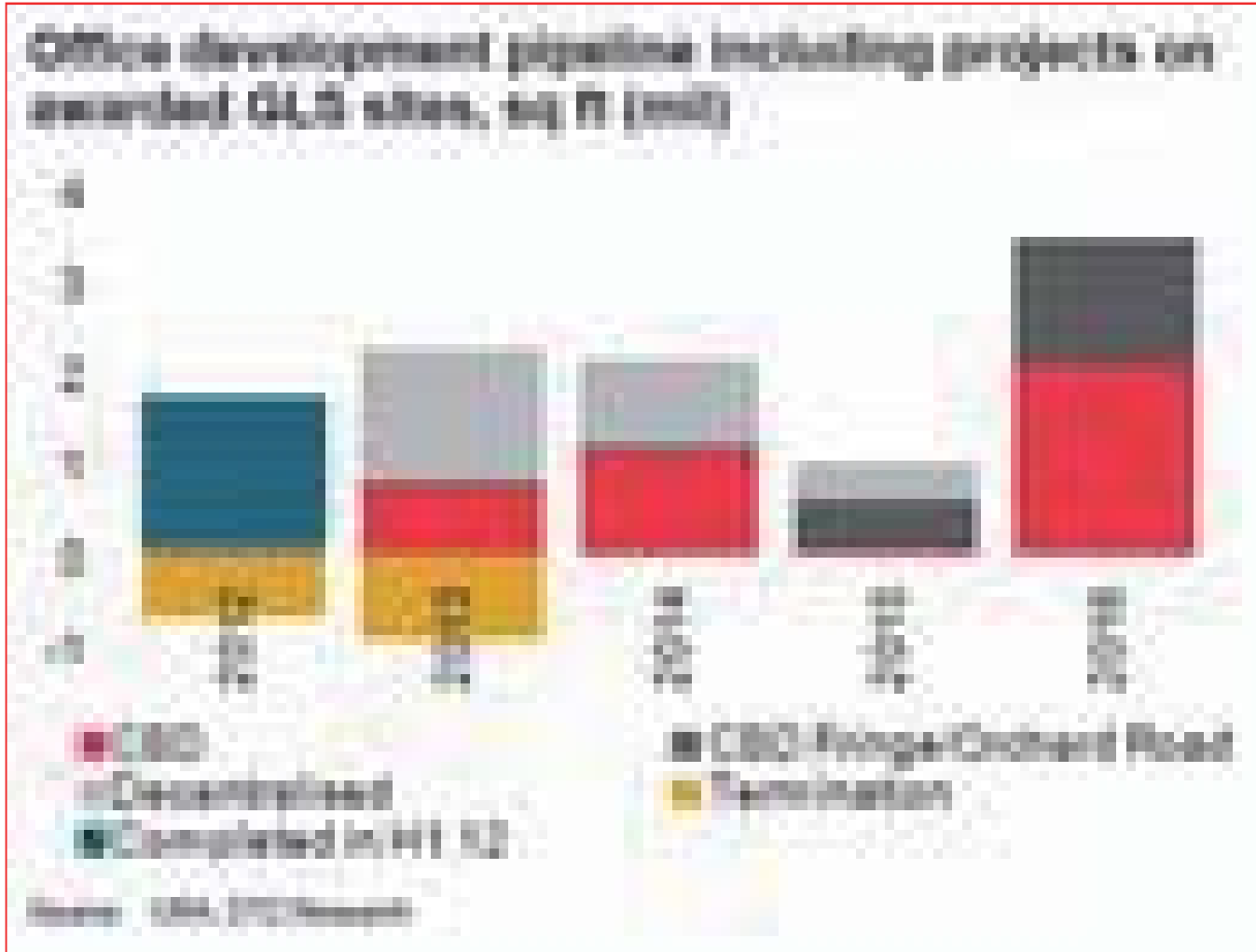
S/ No	Name of Properties	Transacted Prices (S\$million)
01	Compass Point	519.0
02	Tower 15	360.0
03	Key Point	360.0
04	Starhub Green	210.0
05	Tung Centre	63.6
06	Parkway Centre	53.4
07	The Adelphi	50.0



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Projects' Supply in the Pipeline



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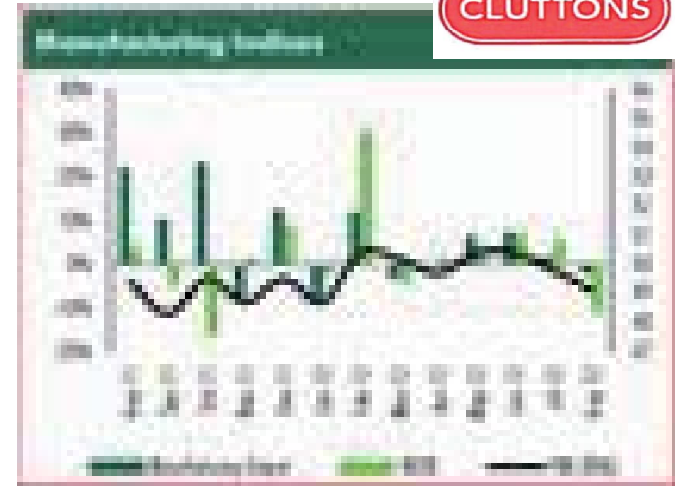


Industrial & Business Parks

- Singapore NODX dives 10.7% yoy.
- Singapore GDP projection revised downward.
- Business park rent held steady at S\$3.7 psf/mth.
- MNCs, inforcom, media and R&D industries - main users looking to relocate in lowering business costs (Vacancy rate stands at 7.5%).
- Main drivers are from oil & gas, logistics sectors.
- Strata sales of industrial units has been active due to recent cooling measures on residential market.

New supply in 2013: -

- One@Changi city (1.04mn)
- Infinite studios (250,000 sqft)
- Sandcrawler (191,000 sqft)

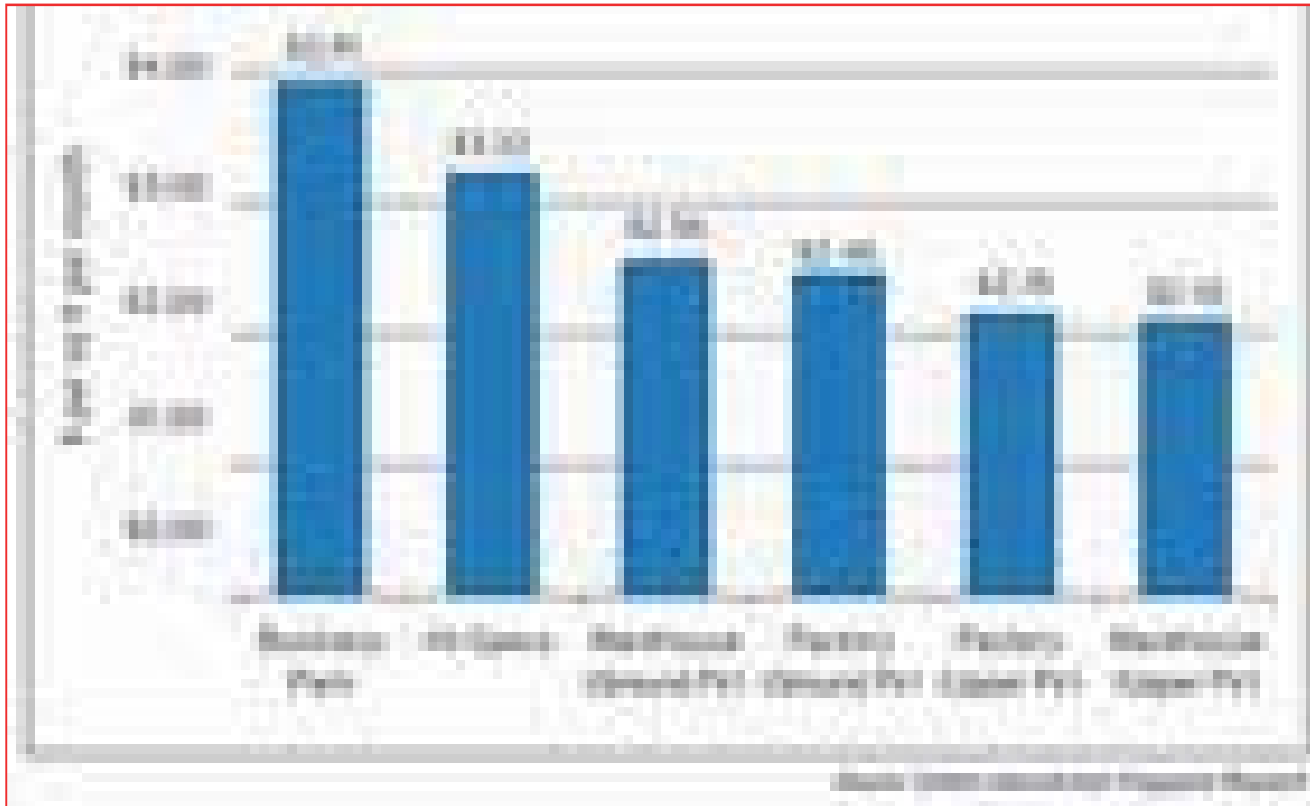


Singapore Industrial & Business Parks Supply			
	2012	2011	2010
Business Park (sqft)	1.2M	1.1M	1.0M
Industrial (sqft)	1.1M	1.0M	0.9M
Warehouse (sqft)	1.0M	0.9M	0.8M
Manufacturing (sqft)	0.9M	0.8M	0.7M
Business Park (sqft)	1.1M	1.0M	0.9M

Singapore Industrial & Business Parks Future Pipeline		
Year	Planned (sqft)	Completed (sqft)
2012	1,200,000	1,100,000
2013	1,300,000	1,200,000
2014	1,400,000	1,300,000

(AS of 3Q 2012)

Rental Performance

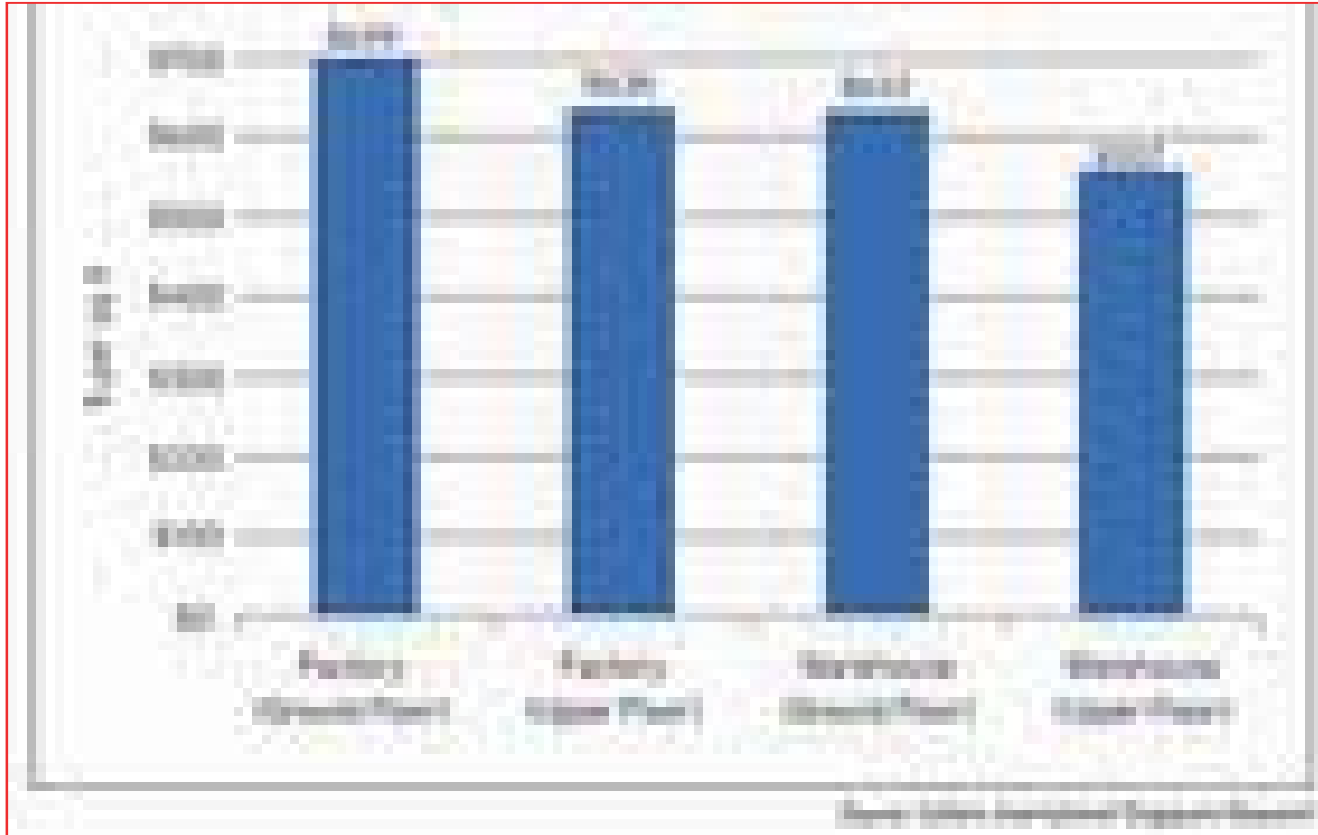


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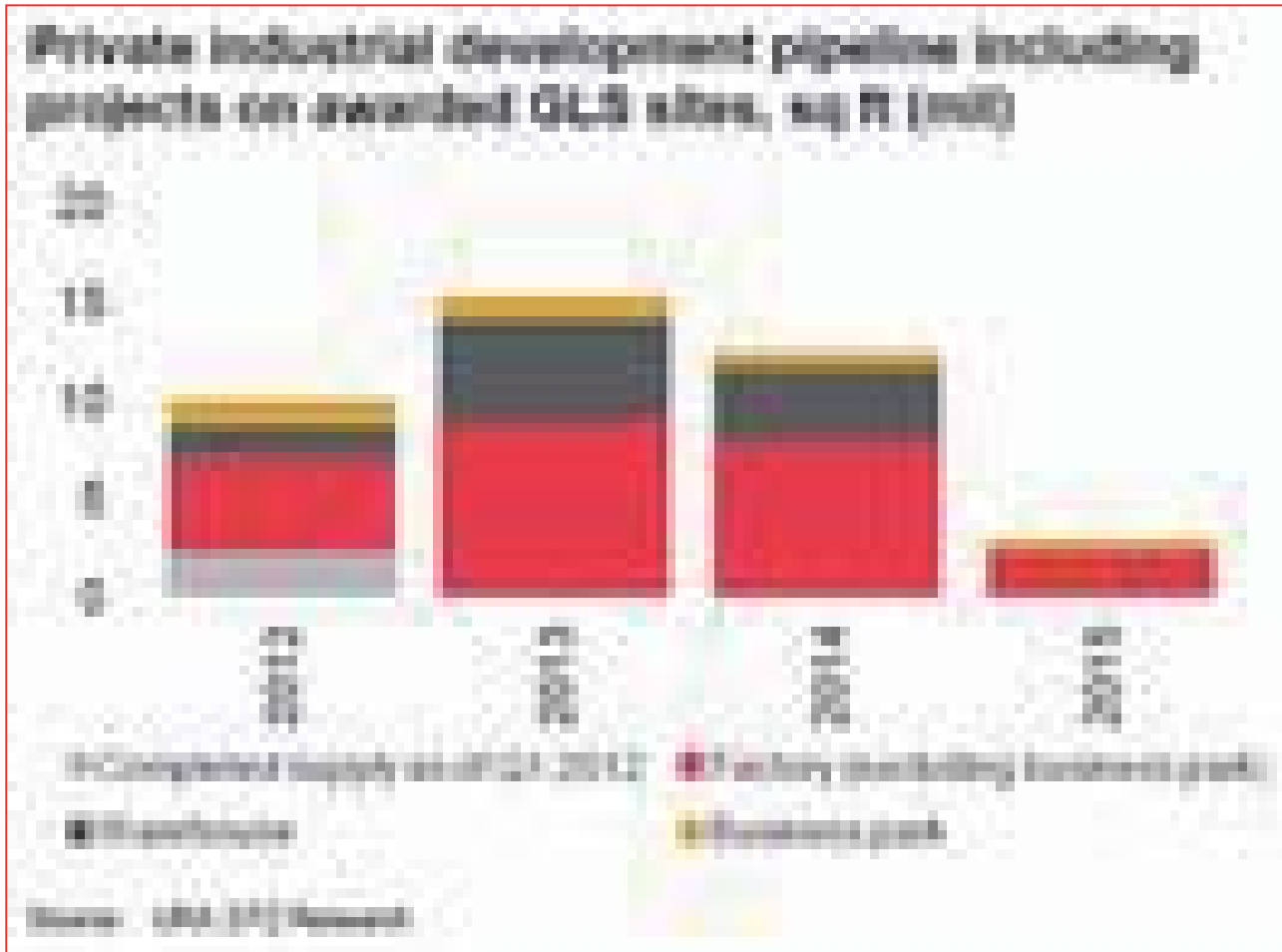


Leases For Industrial Space

- Freehold (As of 3Q 2012)



Spaces' Supply in the Pipeline



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Industrial Projects (Selected)

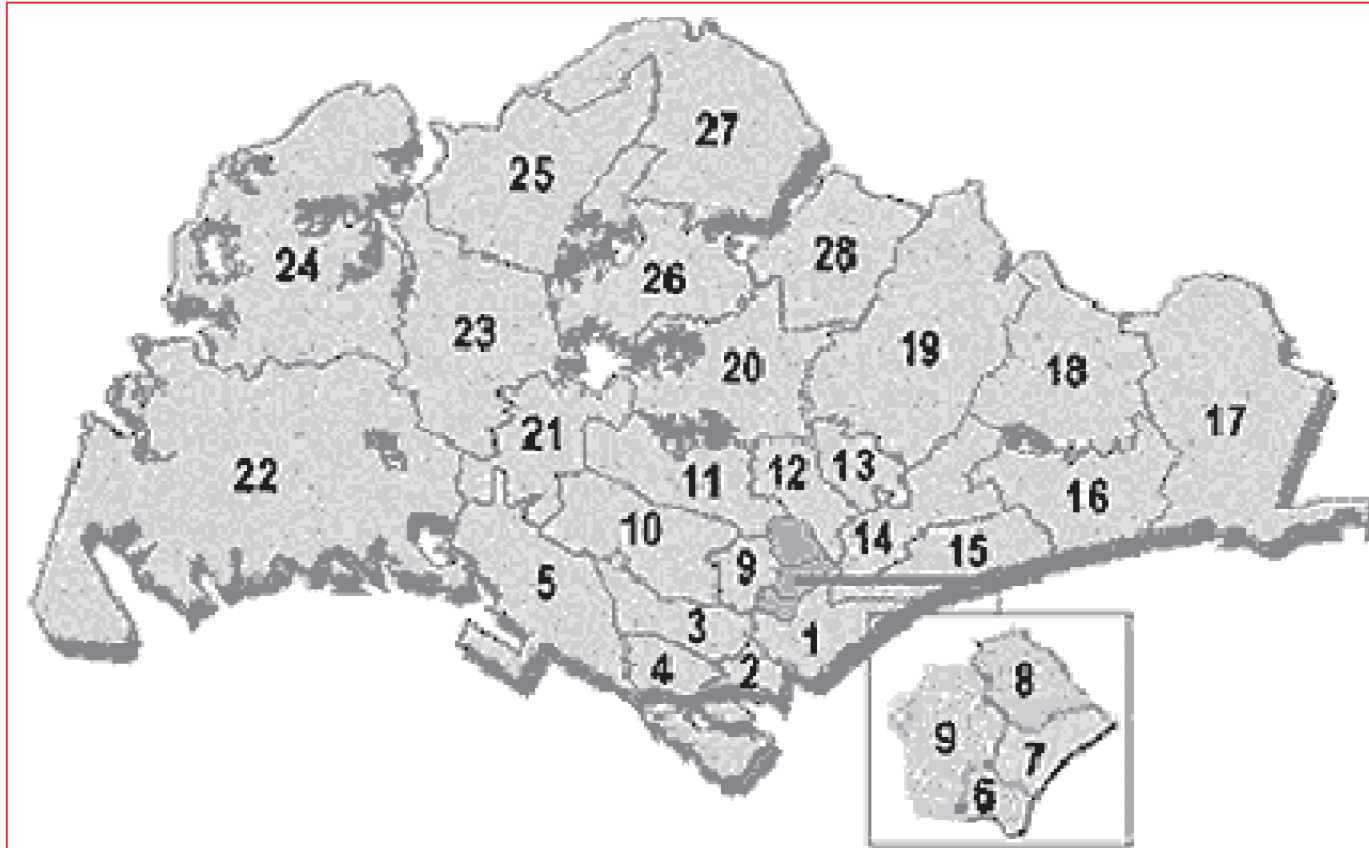
Development	Est. IGA (sq ft)	Est. GDP year
Overight/Chang City	628,000	2012
North Point Wetland	314,000	2012
Sanctuary	181,000	2012
Industria Studies	181,000	2012
North Spring Wetland	1,027,000	2013
Woodlands II	713,000	2013
Harvest/Woodlands	552,000	2013



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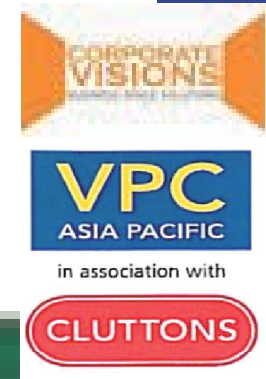
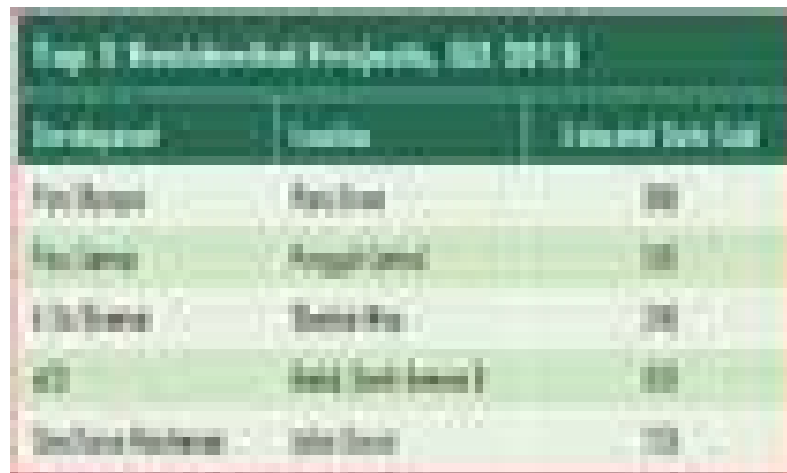
1 Sector



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- About 5,900 units were sold in 3rdQ.
- 16,500 units were sold to date for 2012.
- Best seller - Parc Centros and Parc Olympia at S\$920psf and S\$870psf respectively.
- MND announced 50,300 units will be ready by 2014.
- With new supply coming on stream, sales could top 21,000 units in 2012.

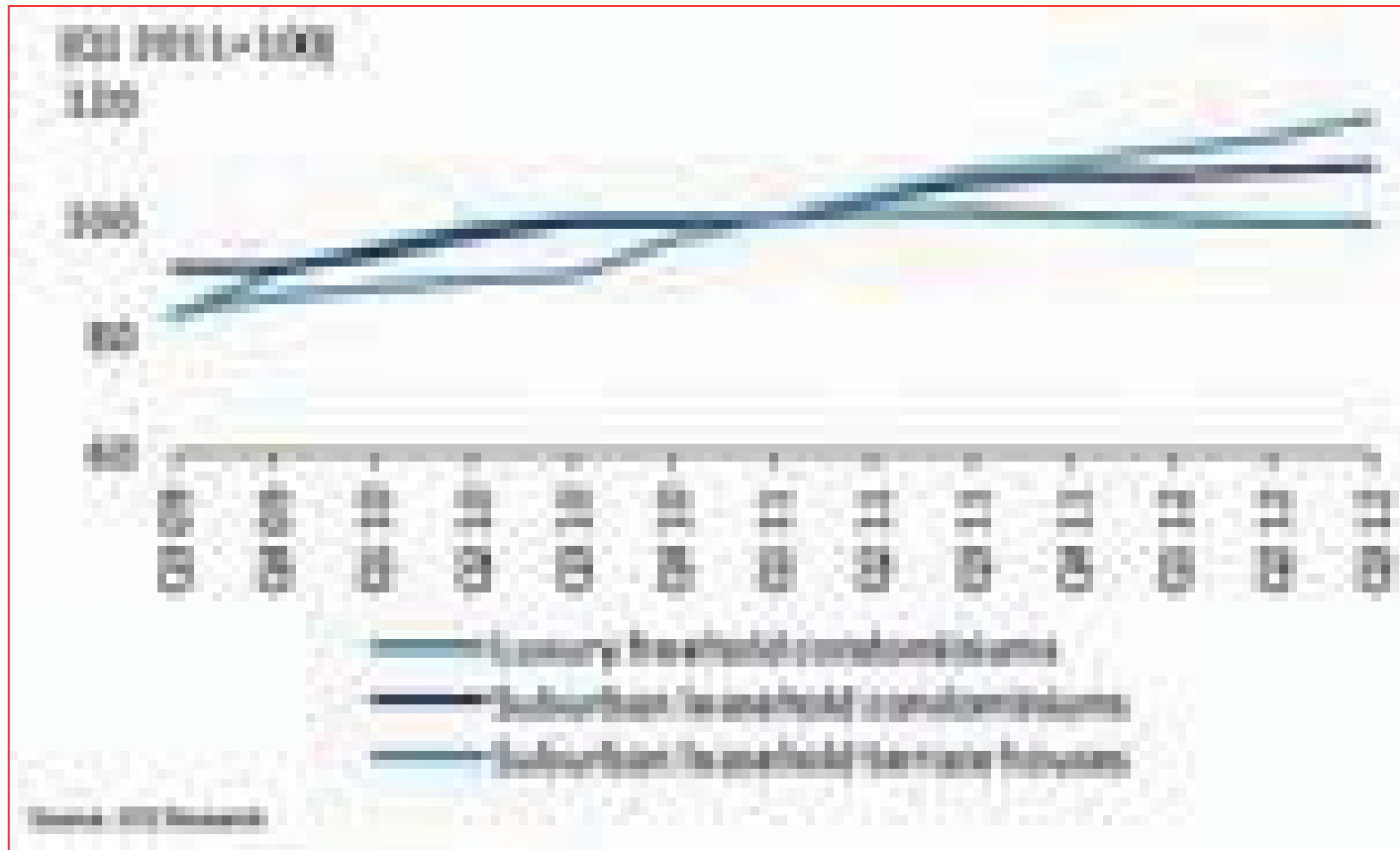



Development	Location	Estimated Unit Count
Parc Centros	Parc Centros	~10,000
Parc Olympia	Parc Olympia	~8,000
Parc Vista	Parc Vista	~6,000
Parc Horizon	Parc Horizon	~4,000
Parc Zenith	Parc Zenith	~3,000



(As of 3Q 2012)

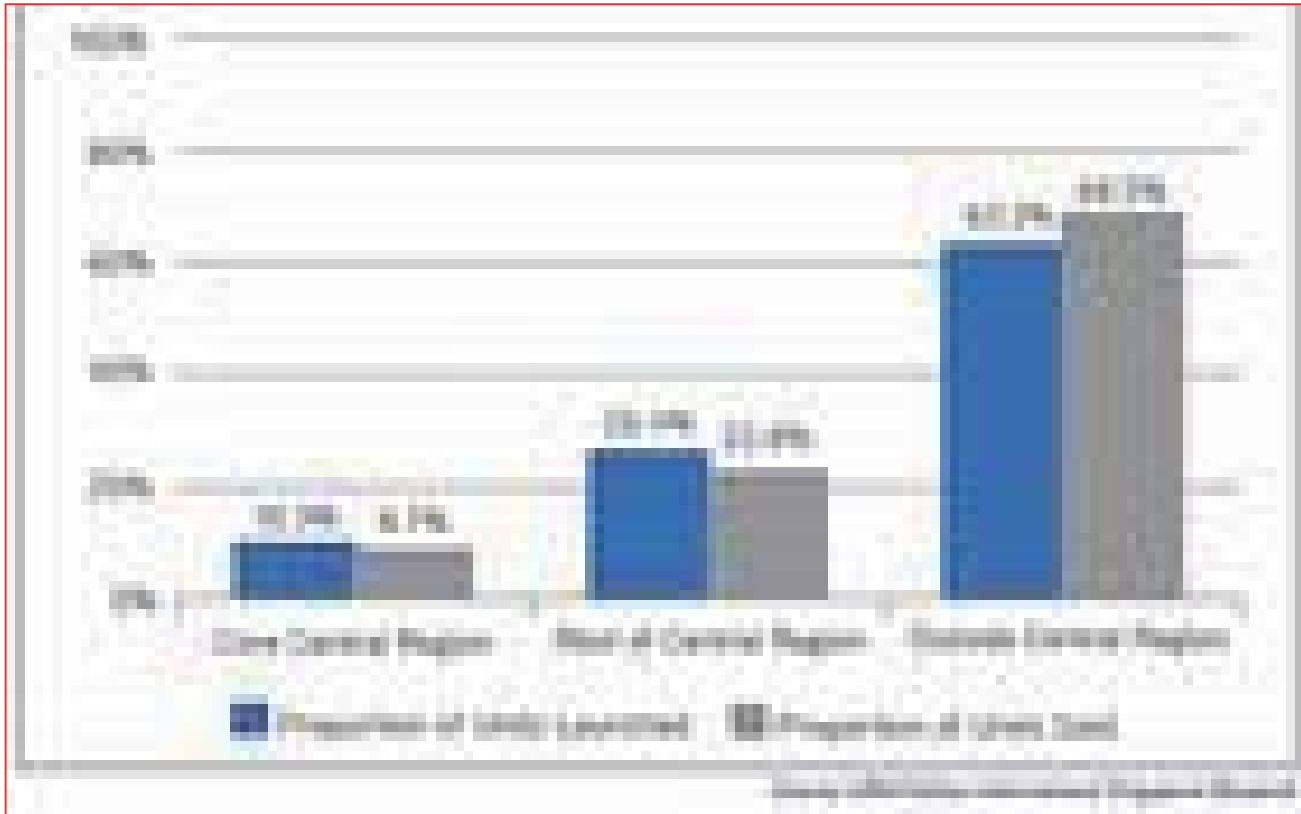
Global Resale Price Index



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of New Units Launched & Sold (As of 2Q 2012)



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ing Thomson Line (TSL)



Thomson Line (TSL) route



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or



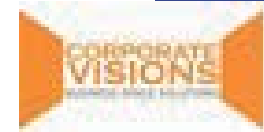
Financial Performance



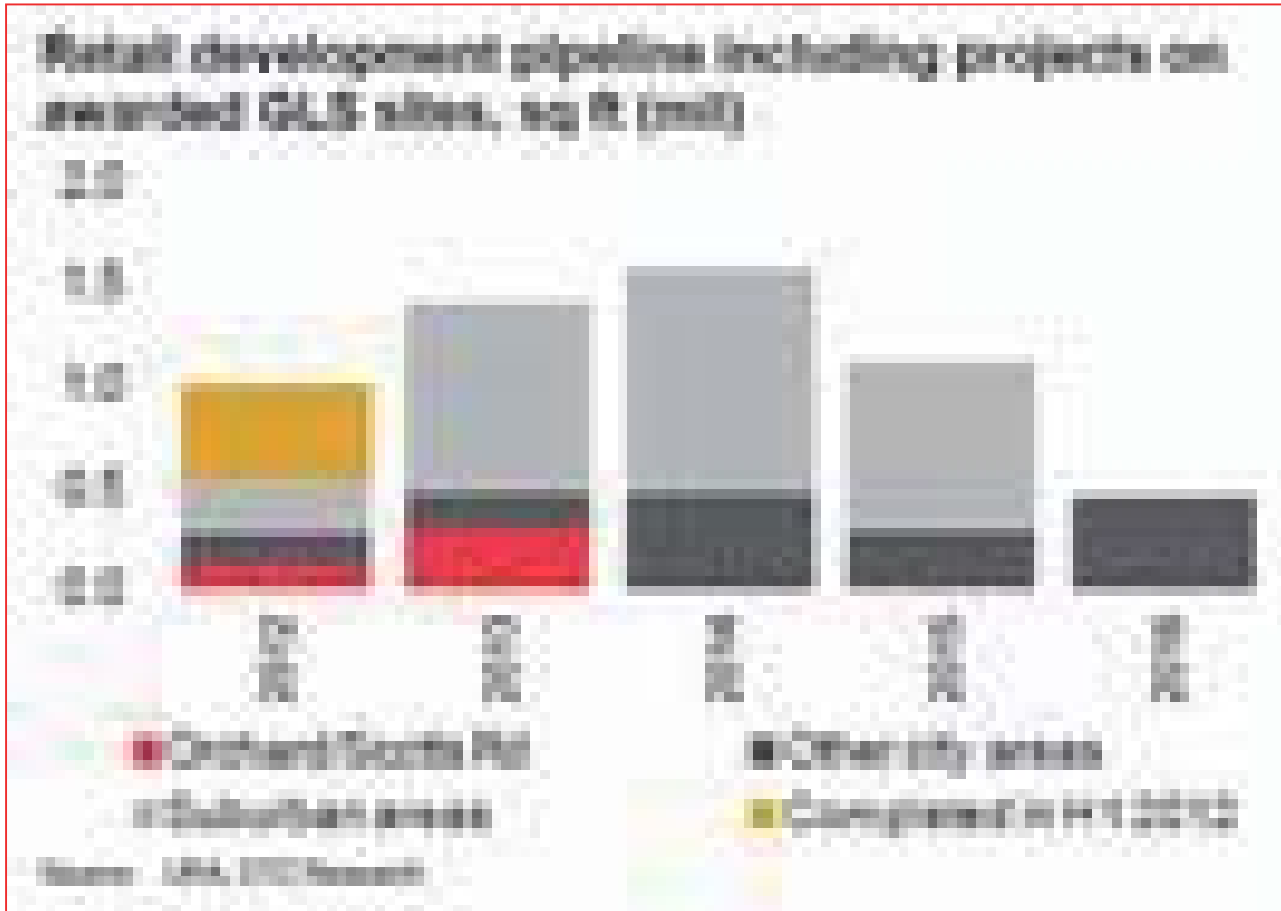
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of Upcoming Retail Developments



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Retail Projects (Selected)

Phase of Development	Area	Est. GFA (sq ft)	Est. FOP Year
Redevelopment of Airway/Oakland	Oakland/Oakland Road	117,000	2013
Meritage	Suburban areas	118,000	2013
204	Suburban areas	113,000	2013
Market Mall	Suburban areas	100,000	2013
airway/Oakland	Oakland/Oakland Road	100,000	2013
Asia Square Tower 2	Other city areas	27,000	2013



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Best Sites – For Hotels

S/ No	Locations	Site Areas (Ha)	Gross Plot Ratio (GFA)	Status
01	Victoria Street/ Jalan Sultan	0.84	4.5	Sold
02	Sturdee Road	0.61	3.0	Applicable for application
03	Race Course Road/ Perumai Road	0.39	3.5	Applicable for application
04	Jurong Town Hal Road	1.00	2.1	Open for tender
05	East Coast Road	0.82	3.0	Applicable for application
06	Victoria Street/ Ophir Road	0.77	4.2	Applicable for application (Nov 2012)

- The above 6 sites can yield approximately 3,700 hotel rooms.



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Street/ Jalan Sultan Site – Tender Results

LAND TRANSACTIONS CONTROL ACT 1967

RELEVANT INFORMATION

LOT NO: [illegible]

REMARKS: [illegible]

DATE OF SALE: [illegible]

DATE OF TENDERING: [illegible]

LOT NO: [illegible]

REMARKS: [illegible]

Lot No.	Lot Description	Original Price	Final Price
1	[illegible]	[illegible]	[illegible]
2	[illegible]	[illegible]	[illegible]
3	[illegible]	[illegible]	[illegible]
4	[illegible]	[illegible]	[illegible]
5	[illegible]	[illegible]	[illegible]
6	[illegible]	[illegible]	[illegible]
7	[illegible]	[illegible]	[illegible]
8	[illegible]	[illegible]	[illegible]
9	[illegible]	[illegible]	[illegible]
10	[illegible]	[illegible]	[illegible]



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Hotel Transaction (22th Oct 2012)

- Hotel Grand Pacific along Victoria Street (opposite Bras Basah Complex) was sold for about S\$210m.
- The price worked out to around S\$850,000 to S\$900,000 per room (300sqft in size) for the 240-room & 16-storey freehold hotel.
- The buyer is a consortium of Asian investors advised by HVS Global Hospitality Services.
- The consortium made an unsolicited offer to the hotel's owner, Sun Asia Pacific Corporation (Singapore), controlled by Paul Sun (Tokyo-born who is a now a Singapore citizen and in his late 70s) who was active in the Singapore real estate market in the 1980s and early 1990s.



Property Taxes Payable By Foreigners

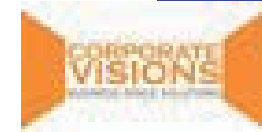
- Property taxes are payable by all property owners.
- GST on legal fees (7% for commercial & industrial properties) and stamp duties apply to property transactions.
- As at 8 Dec 2011, foreigners and corporate entities will have to pay an additional 10% “Additional Buyers Stamp Duty” (ABSD). The extra levy will be 3% for Permanent Residents (PRs) purchasing a second home, as well as for Singaporeans buying their third residential property.
- However, foreigners should note that Sellers’ Stamp Duty is applicable (to all sellers) for disposal of **Residential Properties Only** if they sell within the stated holding period:-
 - Disposal after 1 year of acquisition : **16%** of price/ market value
 - Disposal after 2 years of acquisition : **12%** of price/ market value
 - Disposal after 3 years of acquisition : **8%** of price/ market value
 - Disposal after 4 years of acquisition : **4%** of price/ market value



Measures On Residential Sector

- As at 6th Oct 2012, tighter limits are set for home loans longer than 3 years or extend past age 65; same for re-financing loans.
- For individuals without any outstanding housing loans, the Loan-To-Value (LTV) limit is 60% - down from 80%
- For individuals with one or more outstanding housing loans, the LTV limit is 40% - down from 60%
- Non-individuals loans are set at 40% loan limit.
- For non-individuals (i.e. companies), the LTV limit is 70% - 80% for industrial & commercial properties

REITs Yield World's Best Return – bloomberg dated 5th Sept 12

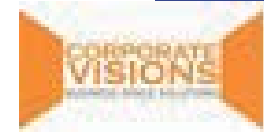


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- Singapore's S\$38 billion REIT market has returned an average **37% in 2012**, twice the gains in the U.S., U.K. and Japan, according to data compiled by Bloomberg. Australia, the largest REIT market in the Asia-Pacific region with S\$86 billion - advanced 24%.
- Growth among Singapore REITs was led by asset acquisitions and rental appreciation.
- Property trusts in Singapore offer an average 413 basis-point income return premium relative to 10-year government bond.
- Dynasty Real Estate Investment Trust, an investor in Chinese property, backed by billionaire Li Ka-shing, is seeking as much as 5.4 billion yuan (S\$851 million) in Singapore's first dual-currency initial public offering.

We Heading ?



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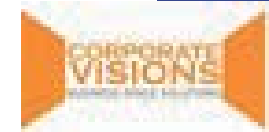


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