



KEL Portfolio Course

This course is aimed at those users wanting to analyse a portfolio, REIT or other fund. It is primarily for our existing KEL Portfolio and KEL PortfolioPlus users but will also be of benefit to our KEL Sigma users who manage portfolios or who may be interested in what our KEL Portfolio program is capable of.

Using your KEL Sigma property database KEL Portfolio produces, not just information, but *intelligence*.

This workshop will explore the production of dynamic analysis identifying not just overall or averaged returns but specific points at which returns peak and trough.

After an initial look at KEL Sigma and the significance of global portfolio tools, scenarios and categories, we will:

- Model rental growth over different periods and sectors
- Assign overall yield shifts, or specify individual capitalisation rates, to explore the impact of softening or hardening of yields on portfolio performance
- Allocate portfolio level or fund costs such as management or transaction fees
- Calculate rolling and periodic IRRs as well as overall returns
- Assess the impact of buying or selling a property during the analysis period
- Include property or portfolio level finance to calculate geared IRRs
- Understand how the use of categories and scenarios in KEL Sigma can enhance analysis in KEL Portfolio
- Derive the equivalent yield for a target portfolio value
- Create reports breaking down portfolios by sector, region or any other property categories of your choice.