



KEL Sigma Workshops:

Categories & Portfolios Workshop

This session is aimed at those tackling portfolio valuations and wanting the global view of their valuation data. By the end of this workshop you will know how to:

- Set overriding assumptions for a portfolio without opening each property
- Generate a table and graphical breakdown of portfolio's value and rent by region
- View percentage variations in property revaluation figures
- Produce a single pdf file containing detailed reports for a whole portfolio
- Create a portfolio of valuations at a new valuation date
- Enhance portfolio reporting by allocating additional categories to properties and units
- Report on a portfolio's income structure broken down by covenant strength
- Create and allocate unit level categories such as planning use class
- Gauge the reversionary potential of a portfolio's income.

DCF & Finance Workshop

This workshop may serve as a refresher to the theory of DCFs and IRRs. This workshop will teach you how to:

- Model rental growth
- Recognise the sensitivity of the exit yields
- Know your way around all the DCF reports
- Set loans to amortise down to target repayments
- Target an IRR and derive a required rental growth percentage
- Understand the significance of exit scenarios
- Compare geared and ungeared IRRs with a single mouse click
- E-mail a report in pdf format
- Generate a DCF bar chart and include it in a report.

Scenarios & Adjustments Workshop

This workshop is for all KEL Sigma users who ever need to do a 'what if' valuation. In this workshop you will learn how to:

- Save time and space by using scenarios
- Compare values & equivalent yields for different scenarios
- Create worst case scenarios with lower ERVs and longer voids
- Link service charge shortfalls with void periods
- Calculate the required equivalent yield from a specified value
- Include the costs and added value of a future refurbishment
- See the effect of a capital cost on a property's running yields
- Trigger a break option and discount the break penalty
- Create a new scenario with a targeted initial yield.