## REITS By The Numbers



REITs are widely held real estate investment companies that own more than of real estate.

Through their own operations and use of their facilities, REITs help support nearly  $\frac{1}{1000}$ ,  $\frac{1}{1000}$  in the U.S. each year.

\$178k

60% Stocks

40% Bonds

+10% REITS 55% Stocks

35% Bonds

\$194k

REITS

50% Stocks 30% Bonds

+20%

\$210k

What \$10,000 invested on Dec. 31, 1982, would be worth on Dec. 31, 2012, using the FTSE NAREIT All Equity REIT Index

Nearly 50 million Americans – from teachers and firefighters to retirees and executives - invest in REITs through their 401(k)s.

5%

Over the last decade, the percentage of 401(k) plans offering REITs as an investment option has increased from 5 percent to 30 percent.

More than

mutual funds and exchange-traded funds (ETFs) are dedicated to stock-exchange listed REITs.

listed REITs are currently registered with the Securities and Exchange Commission.

160 REITs are traded on the New York Stock Exchange with an equity market cap of about



Several sectors of the REIT market delivered total returns for the past 10 years:









Residential Self storage

**Health Care** 



Looking at inflation rates over rolling six month and rolling 12 month time periods, returns on equity REIT investments outpaced the period inflation rate 75 percent of the time.

**REITs** paid out approximately \$27 billion in dividends in 2012





There are nearly 40,000 stockexchange listed REIT-owned commercial properties in the U.S.



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REITS (Real Estate Investment Trusts) are a type of real estate investment company modeled after mutual funds. REITs were established by Congress in 1960 to provide Americans from all income levels the opportunity to invest in income-producing real estate. Congress understood then - as it does now - the diverse role real estate plays in the U.S. economy.

Over the past five decades, REITs have helped achieve important economic goals. REITs support the growth of the U.S. economy by effectively and efficiently channeling capital into real estate, bringing greater transparency to real estate investment, creating liquidity in the real estate sector of the economy and contributing to the nation's tax base.

Today, REITs are tied to almost all aspects of the economy, including apartments, data centers, hospitals, hotels, industrial facilities, life-science buildings, nursing homes, offices, shopping malls, storage centers, student housing, and timberlands.

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