

# REAL ESTATE INVESTMENT FUNDAMENTALS

## **COURSE OVERVIEW**

This foundation course introduces participants to the principles of real estate investment and the metrics used to evaluate property performance. Participants will learn to assess investment opportunities, understand risk-return relationships, and structure basic real estate transactions. The program provides essential knowledge for professionals entering investment roles or seeking to understand how real estate investment decisions are made. Through practical examples and case discussions, participants will build confidence in investment analysis fundamentals.

## **TARGET COMPETENCIES**

- Investment Metrics
- Risk Assessment
- Deal Structuring
- Due Diligence
- Investment Strategies

## **COURSE OBJECTIVES**

By completely attending this course, participants will be able to:

- Calculate and interpret key investment metrics including ROI, cap rates, and IRR
- Assess risk factors associated with different property investments
- Structure basic real estate transactions and partnerships
- Conduct preliminary due diligence on investment opportunities
- Distinguish between core, value-add, and opportunistic investment strategies

## **TARGET AUDIENCE**

This course is designed for professionals new to real estate investment or those seeking to formalize their foundational investment knowledge. It is suitable for:

- Junior investment analysts and associates
- Real estate professionals transitioning to investment roles
- Finance professionals entering real estate
- Family office staff managing property investments

# **COURSE METHODOLOGY**

This course combines interactive lectures, investment calculations, deal case studies, and group analysis exercises.

## **COURSE OUTLINE**

### **INVESTMENT METRICS**

- Return Measures
  - Cash-on-cash return calculations
  - Internal rate of return fundamentals
  - Equity multiple interpretations
- Yield Analysis
  - Capitalization rate applications
  - Net operating income calculations

### **RISK ASSESSMENT**

- Risk Categories
  - Market and location risks
  - Tenant and lease risks
- Risk-Return Relationship
  - Risk premium concepts
  - Risk mitigation strategies
  - Portfolio diversification basics

### **DEAL STRUCTURING**

- Ownership Structures
  - Direct ownership considerations
  - Joint venture fundamentals
- Capital Stack Basics
  - Debt and equity components
  - Leverage effects on returns

### **DUE DILIGENCE**

- Property Analysis
  - Physical condition assessments
  - Environmental review requirements
  - Title and legal review basics
- Financial Review
  - Rent roll analysis
  - Operating expense verification

### **INVESTMENT STRATEGIES**

- Strategy Types
  - Core and core-plus investments
  - Value-add opportunities
  - Opportunistic investments
- Strategy Selection
  - Investor profile matching
  - Market cycle considerations

