

IN THE NEWS



## ADVISORS WANT ALTS. HERE'S HOW BROKER-DEALERS PICK THEM

Advisors, who are expected to increase their alternatives allocations in coming years, plan to do so to limit exposure to stocks, protect against volatility and hunt for income. Volatility dampening and downside risk protection are the leading considerations.

Source: *Financial Advisor IQ*

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## INSTITUTIONS MAY DEPLOY DRY POWDER FOR REAL ESTATE HEADING INTO 2023

A healthy signal that price declines will be met with new capital looking to be deployed into the space, particular the healthier sectors. This should limit any prolonged or significant downturn in values as new capital and higher allocations will support pricing.

Source: *Wealth Management*

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## INDUSTRIAL AND MULTIFAMILY SECTORS STAY RESILIENT AMID ECONOMIC HEADWINDS

A good reminder that not all real estate sectors move together and are cyclical. Industrial and multifamily drivers appear too strong to be significantly impacted by a weak economy.

Source: *Globest*

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## ADVISORS TO MAKE BIGGER PUSH INTO ALTS IN 2023

With more advisors set to increase allocations in the coming years, private credit, non-traded REITs, and interval funds appear to be the most popular vehicles for placement.

Source: *Fund Fire*

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FEATURE CONTENT



## HERE'S (ALMOST) EVERYTHING WALL STREET EXPECTS IN 2023

As the Federal Reserve ramps up its most aggressive tightening campaign in decades, the consensus view is that a recession, albeit mild, will hit both sides of the Atlantic with a high bar for any dovish policy pivot, even if inflation has peaked. Here are more than 500 Wall Street analyst views on everything from growth to yields to recession.

Source: *Bloomberg*

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QUOTES OF THE QUARTER

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“The industrial leasing story continues to be the strongest theme maybe in all of commercial real estate with demand remaining robust. We see pre-leasing of Class-A buildings and a rising tide of rental rate growth for B and C buildings that are well-located. Historic rate increases and rental growth are supporting the development and have been supportive of higher land prices for the last several years.”

**Jeff Rinkov,**

CEO Lee & Associates

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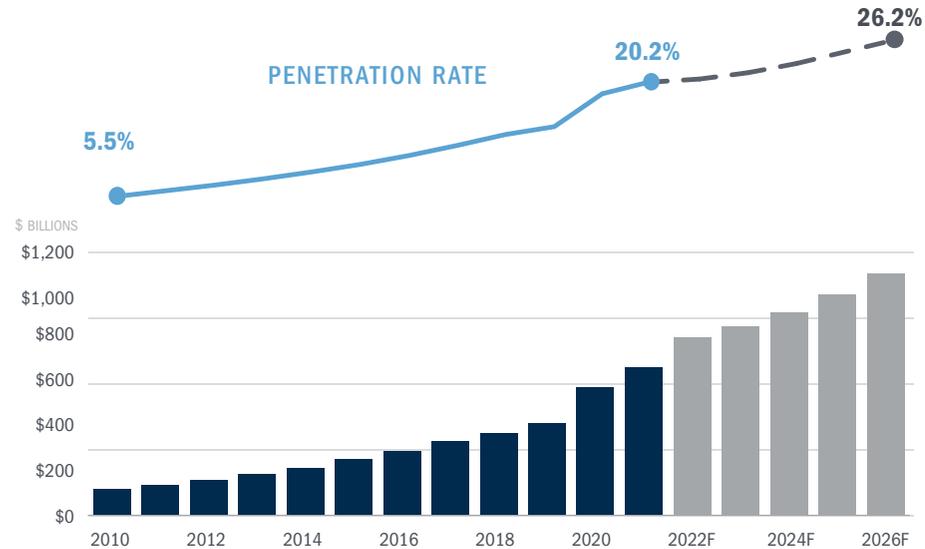
The alternatives product market “is rapidly growing in terms of size and differentiation, making it increasingly difficult to singularly define.”

**Ryan Shugrue,**

Director of Wealth Management Research at Janney Montgomery Scott

NEW DATA

## E-COMMERCE PENETRATION WILL LIKELY KEEP RISING

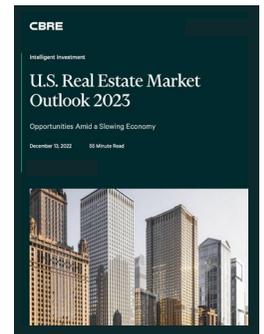


Source: Prologis; U.S. Logistics Real Estate at an Inflection Point

RESEARCH REPORT

## CBRE U.S. REAL ESTATE MARKET OUTLOOK | DECEMBER 2022

“The recession will not be particularly deep. Corporate finances are in good shape and employers will shun excessive layoffs to avoid losing employees in a tight market for skilled labor. While consumer confidence is highly subdued, average household debt is low compared with the onset of previous recessions. These factors suggest a moderate downturn, with unemployment unlikely to breach the 6% level. Inflation will be significantly lower by the second half of 2023, setting the stage for falling interest rates and the beginning of a new cycle that will last to the 2030s.”



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