
From: jeffrey E. <jeevacation@gmail.com>
Sent: Thursday, November 3, 2016 4:05 PM
To: Richard Kahn
Subject: Re: REIT Ideas

yes

On Thu, Nov 3, 2016 at 4:57 PM, Richard Kahn richardka=n12@gmail.com <[REDACTED]> wrote:

shall i ask Paul B if he likes any of attac=ed names?

Richard Kahn
HBRK Associates Inc.

New York, NY 10022
tel 212-971-1306=/a>
fax [REDACTED]
cell [REDACTED]

Begin forwarded message:

From: Andrew King <[REDACTED]>
Cc: Stewart Oldfield <[REDACTED]=; Darlene Zong <[REDACTED]>
<mailto:[REDACTED]>

Ric=ard,

Following up on our conversation on Tuesday, I've=attached a basket of North American REITs that are rated "buy♦=80♦ by our colleagues in Global Markets. We've highlighted sever=I REITs where they are favorable on the sector and have a buy rating, and have attached the most recent reports on each. Please let us k=ow if you'd like us to send reports on any of the other names list=d in the basket.

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Data Centers <=b>(page 4 of "US REIT 3Q16 Earnings Preview")

* Digital Realty Trust (DLR)

* CyrusOne (CONE)

Health Care (page 5 of "US REI= 3Q16 Earnings Preview")

* Medical Properties Trust (MPW)

Additionally, I've attached information on two REI= managers we recommend for diversified exposure to US REITs:=/p>

SMA:

* Adelante Capital Management

Mutual Fund:

* Deutsche Real Estate Securities Fund

=p class="MsoNormal">Please let me know if you'd like to discuss =he basket or funds in greater detail.

Best regards,
Andrew King

Andrew=King, CFA
Vice President, Investment Solutions Group

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345 Park Avenue, New York, NY 10154
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please note

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JEE

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