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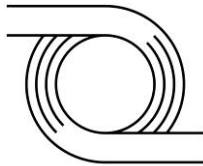
Real Estate and Development

Real Estates Bullets #28

Hello to our **7,859 familiar faces** from last week, and a **warm welcome** to all our **new readers!**

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D & D ENGINEERING, INC.



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Bullets #28:

Morgan Stanley Is Bullish on Real Estate in 2024

Lauren Hochfelder, **Morgan Stanley Real Estate** Investing Co-CEO, explains why she's so bullish on the commercial real estate sector heading into 2024. She speaks on "Wall Street Week" daily. Here is a summary of the video:

- Sees the **current market** as one of the best in 30 years.
- Acknowledges deep distress in tough real estate assets, **presenting opportunities** for investors.
- Emphasizes focusing on **long-term mega trends**, starting with the industrial sector driven by e-commerce growth.
- Recognizes **increased demand** for healthcare facilities, advising consideration of senior housing and medical offices.
- Cautions on the impact of **declining interest rates** on properties facing refinancing challenges.
- Suggests **monitoring the speed** and extent of rate decreases for strategic decision-making.
- Advises **capitalizing on near-shoring and re-shoring** trends in the U.S., Mexico, and India.
- Highlights opportunities arising from traditional banks reducing commercial real estate exposure.
- Recommends **region-specific** residential considerations, such as Europe's regulated rents and attractive entry points.
- Highlights **unique dynamics in Asia**, particularly Japan, where healthy inflation is driving residential growth.
- Stresses excitement about **positive effects of healthy inflation** in Japan, recommending a focus on regions with growth potential.
- Overall, encourages investors to **explore diverse opportunities** in the global real estate market, aligning with long-term trends.

Full Video



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