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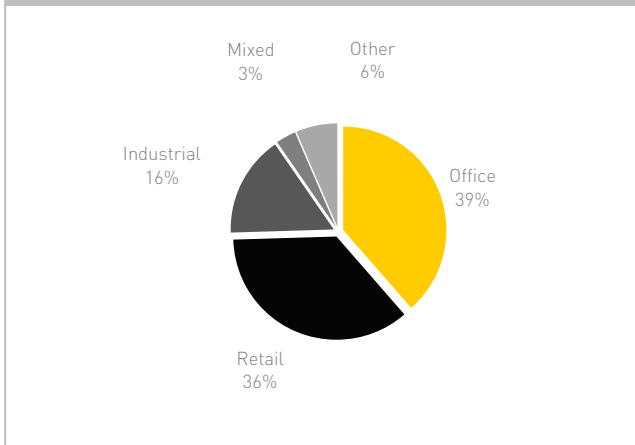
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JUNE 2010

The June summary of the investment market shows activity rising following a slow start to the year. The Q2 2010 total exceeded Q1 2010's total by 12%. For more detail contact the CoStar Analytics team.

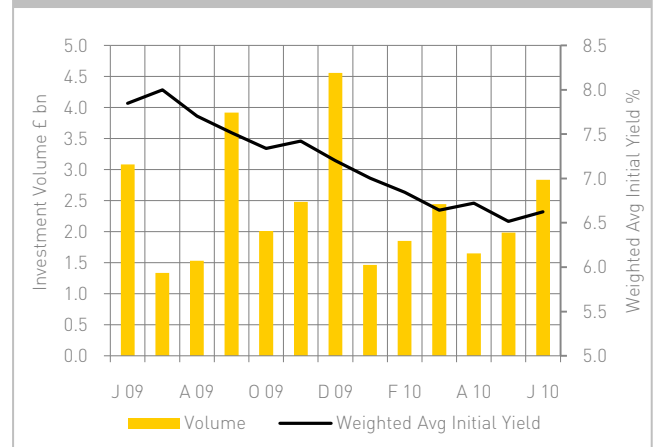
- CoStar recorded £2.84 billion of sales in June, taking the Q2 total to £6.47 billion. There is a further £1.58 billion completed or under offer in Q3 to date.
- Industrial properties represented 16% of Q2 deals by value compared with 8% in Q1. This was boosted by the >£200 million Radial portfolio sale, along with other single/portfolio sales between £20 million and £50 million.
- The average initial yield moved out slightly in June, to 6.6%, returning to the level at the end of Q1 and suggesting there is still some uncertainty in the market.

Investment by Sector – 3 Months to June 2010



Source: CoStar

Investment Volume & Initial Yield



Source: CoStar

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KEY DEALS JUNE 2010

SECTOR	REGION	SIZE (sq ft)	PRICE (£m)	YIELD (%)	PURCHASER	VENDOR
▪ Knightsbridge Estate Portfolio, London						
Retail	London	550,000	600.0	4.0	Olayan Group	Avestus Capital Partners
▪ Milton Gate, 60 Chiswell Street, London						
Office	London	201,665	164.0	6.0	Private Middle Eastern	Evans Randall
▪ Condor House, 5-14 St Paul's Churchyard, London						
Office	London	116,860	102.0	5.4	SEB Asset Management	Evans Randall
▪ Governor's House, 5 Laurence Pountney Hill, London						
Office	London	125,920	86.0	6.0	Private Investor	GLL Real Estate Partner
▪ MEN Arena, Manchester						
Other	North West	-	62.2	7.2	Development Securities	Capital & Regional

Source: CoStar

* Completed, verified and non-confidential deals only



Investment Agents League Table Q2 2010

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AGENTS ACQUISITIONS

CB Richard Ellis claimed 1st place as the top agent for acquisitions in Q2 2010.

Market highlights include:

- £208.5m purchase of The Radial Portfolio by London & Stamford and Anglesea Capital (CB Richard Ellis & Savills)
- Blackrock's £149.75m acquisition of The Abberville Portfolio (Strutt & Parker)
- £126m purchase of the O2 Centre in London's Finchley Road by Land Securities (Jones Lang LaSalle)
- Condor House, London EC4 acquired by SEB for £104.3m (Jones Lang LaSalle)
- £67m acquisition of 75 King William Street, London EC4 by Scottish Widows (Lewis Ellis)
- £62.2m purchase of the MEN Arena in Manchester by Development Securities (Whitaker Horton)
- Aviva's £60.4m acquisition of Cambridge Close Retail Park in Aylesbury (Edgerley Simpson Howe)

Q2 2010 (Q1)	Acquisition Agent	Value £m
1 (4)	CB Richard Ellis	645.5
2 (2)	Jones Lang LaSalle	535.6
3 (3)	Savills	331.6
4 (6)	Strutt & Parker	305.7
5 (10)	DTZ	268.5
6 (1)	King Sturge	190.7
7 (8)	Knight Frank	174.5
8 (12)	Tudor Toone	163.0
9 (14)	NB Real Estate	150.9
10 (5)	Cushman & Wakefield	138.9
11 (-)	Drivers Jonas Deloitte	122.9
12 (-)	H2SO	104.0
13 (15)	GVA Grimley	100.8
14 (-)	Colliers International	95.9
15 (-)	Edgerley Simpson Howe	87.4

Q2 2010 (Q1)	Disposal Agent	Value £m
1 (1)	CB Richard Ellis	1,310.2
2 (9)	Knight Frank	583.0
3 (2)	Jones Lang LaSalle	581.5
4 (12)	Cushman & Wakefield	519.1
5 (7)	King Sturge	400.5
6 (5)	Strutt & Parker	272.3
7 (6)	DTZ	247.7
8 (-)	GM Real Estate	180.0
9 (3)	Morgan Williams	152.8
10 (-)	GVA Grimley	140.9
11 (-)	David Baroukh Associates	131.4
12 (13)	Montagu Evans	127.5
13 (4)	Savills	123.4
14 (15)	Colliers International	114.7
15 (-)	Michael Elliott	90.5

AGENTS DISPOSALS

For the third consecutive quarter CB Richard Ellis led the way in the disposals table.

Disposals of note include:

- £600m sale of The Knightsbridge Estate, London SW3 by Avestus Capital Partners (CB Richard Ellis)
- Evans Randall's £164m disposal of Milton Gate in the City of London (CB Richard Ellis)
- £102m disposal of 30 Finsbury Square, London EC2 by Aberdeen Immobilien KAG (Jones Lang LaSalle)
- City Place House, London EC2 sold by AEW Europe for £94m (GM Real Estate)
- £94m sale of The Cobalt Portfolio by the Wellcome Trust (Cushman & Wakefield)
- Orion House, London WC2 sold by UK & European Investments for £74.5m (Montagu Evans)
- £80.38m disposal of The Kilmartin Portfolio by receivers (Knight Frank)