

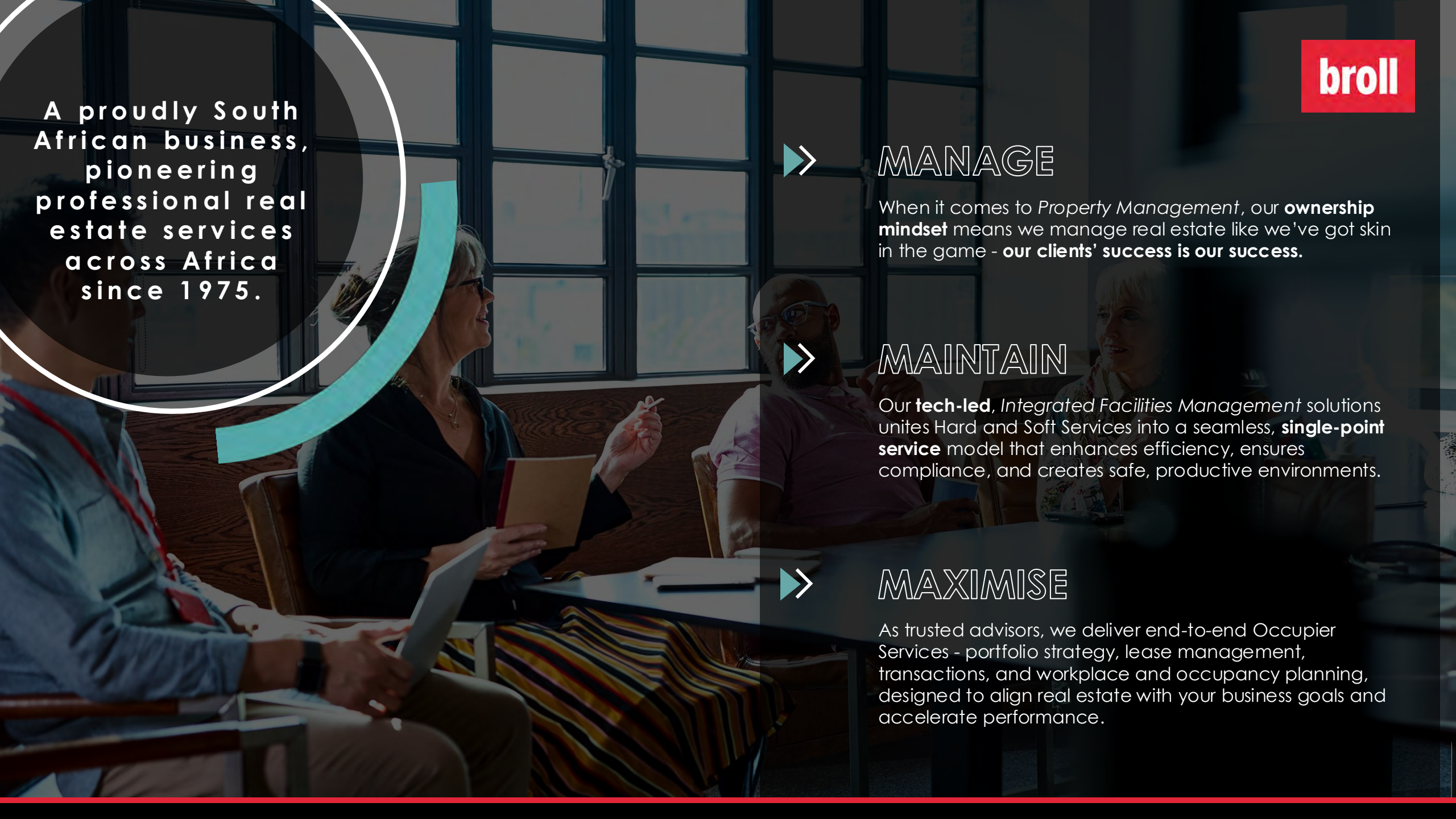
broll

A LEGACY OF LEADING 50 YEARS ANNIVERSARY

INVESTMENTS REQUIRE RETURNS.
REAL ESTATE DEMANDS EXPERTISE.
WE DELIVER BOTH.

COMPANY **OVERVIEW 2025**

Registered with the PPRA and operates trust accounts.



A proudly South African business, pioneering professional real estate services across Africa since 1975.

broll

MANAGE

When it comes to *Property Management*, our **ownership mindset** means we manage real estate like we've got skin in the game - **our clients' success is our success.**

MAINTAIN

Our **tech-led**, *Integrated Facilities Management* solutions unites Hard and Soft Services into a seamless, **single-point service** model that enhances efficiency, ensures compliance, and creates safe, productive environments.

MAXIMISE

As trusted advisors, we deliver end-to-end Occupier Services - portfolio strategy, lease management, transactions, and workplace and occupancy planning, designed to align real estate with your business goals and accelerate performance.

OUR GROUP CAPABILITIES

World-class services leading to sustainable real estate success.

broll

A LEGACY OF LEADING 50 YEARS ANNIVERSARY

1975
Broll Property Group Established

2,500+
Employees

Developers & Enablers of **Award-Winning Businesses** Across Africa.

Sustainable & Compliant Systems
ISO 9001 QMS
ISO 45001 OHS
ISO 14001

Largest Brokerage Network in Africa

8,200
Vendor/Supplier Relationships

449
Largest shopping centre management company in Africa

Manage Africa's 3 largest Govt. Pension Funds

Total Value of Properties Valued
$6bn

Assets Under Occupier Management
$4bn

Broll Academy
3,600
Learnership & Skills Development Training

Manage **17** of the largest listed funds in Africa

$18.2bn
Total Value of Assets Under Management

$3.7bn
Assets Under Facilities Management

Disposal of
<R10bn
worth of assets over the last decade

Space Under Management
62m m²

Total Portfolio Value of Listed Funds Managed **$5.2bn**

59,000+
Leases Managed

In affiliation with the NYSE-listed, top-third global real estate firm, **Cushman & Wakefield**

*Africa, Annually

OUR GEOGRAPHICAL COVERAGE

Shaping Africa's Real Estate Market for 50 Years!



42+ International real estate excellence awards over the past 5 years

broll

Our PURPOSE

We specialise in **building successful businesses in developing markets.**

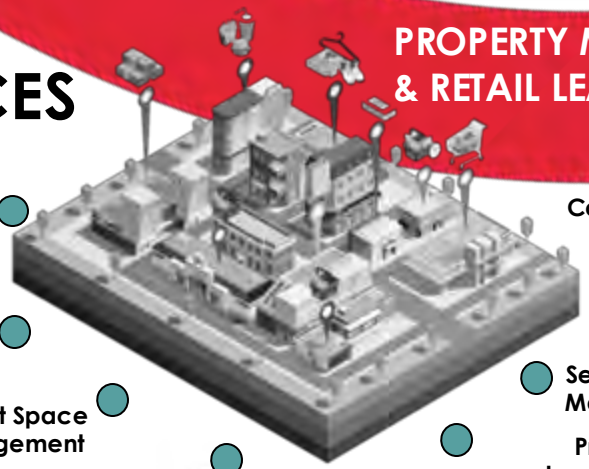
How?

By **embedding** ourselves into any context **and mobilising professional real estate services -** driving **economic growth**, and elevating **industry standards.**

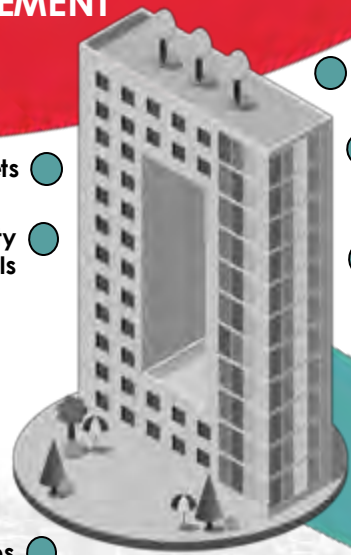
FULL SPECTRUM, TECH-LED SERVICES

for Real Estate Owners & Occupiers.

PROPERTY MANAGEMENT & RETAIL LEASING



- Retail Leasing & Consulting
- Lease Negotiations & Renewals
- Vacant Space Management
- Turnover Reporting & Analysis
- Tenant Co-ordination & Comm's
- Rent Recoveries & Accounts Payment
- Capital Markets
- Private Treaty Deals
- Sectional Title Management
- Property Inspections & Insurance
- Investment Sales

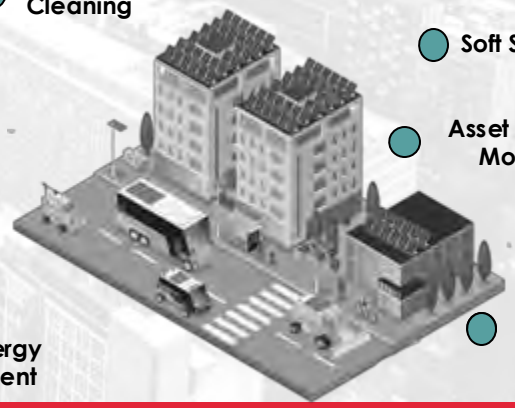


- Estate Management
- Corporate Real Estate Portfolio Strategy & Renewals
- Workplace Design & Build
- Brokerage

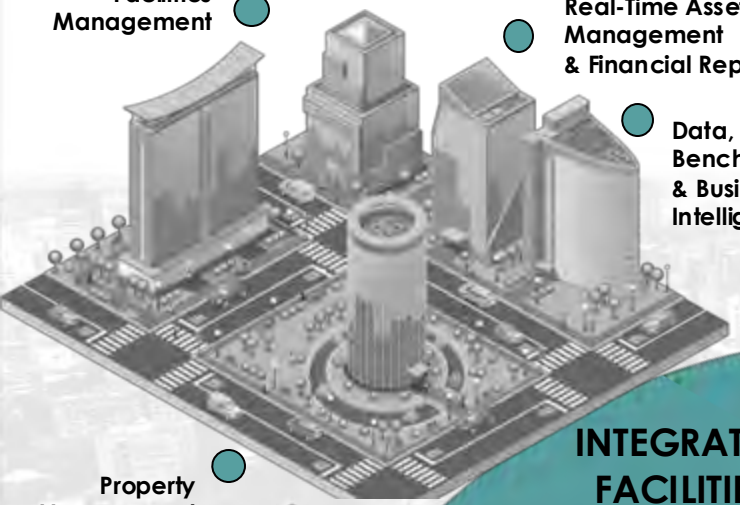
OCCUPIER SERVICES



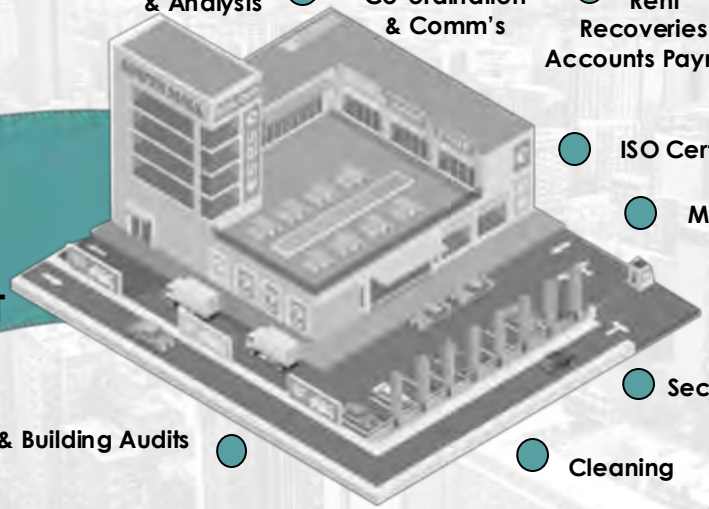
- ISO Certification
- Management System
- Strategic Risk Management
- Security
- Academia/ Student Housing
- Security & Surveillance
- Estate Management
- Technical Services
- Soft Services
- Asset Tagging & Monitoring
- Disaster Recovery & Business Continuity
- Insurance Compliance



INTEGRATED FACILITIES MANAGEMENT

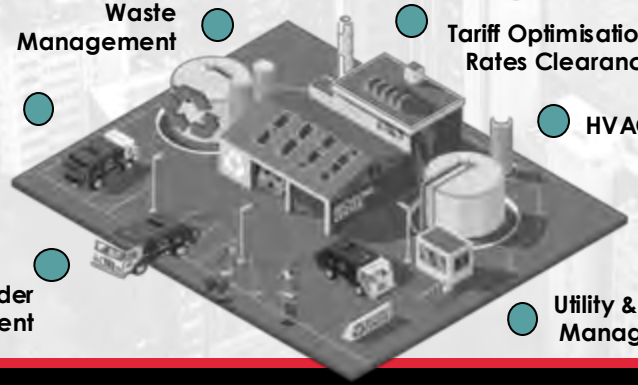


- Facilities Management
- Real-Time Asset Management & Financial Reporting
- Data, Analytics, Benchmarking & Business Intelligence





- Property Management / Skills Training
- Vendor & Contractor Coordination
- Indoor Air Quality Monitoring
- Energy Performance Audits & Certificates



- Energy & Building Audits
- Waste Management
- Tariff Optimisation & Rates Clearance
- Sanitation
- HVAC
- Service Provider Management
- Utility & Energy Management
- Cleaning

MINI-CITY MANAGEMENT

LEADING ACROSS PUBLIC & PRIVATE SECTORS

Secured 6 major multi-national contracts across Africa in the last 18-months

broll

LISTED FUNDS

grit Real Estate Income Group

actis

EMIRA PROPERTY FUND

Lango

RESILIENT REIT

SA CORPORATE REAL ESTATE

FORTRESS REAL ESTATE INVESTMENTS

sasol reaching new frontiers

FAIRVEST PROPERTY HOLDINGS

VUKILE PROPERTY FUND

INSTITUTIONS/ PUBLIC SECTOR

Eskom

PUBLIC INVESTMENT CORPORATION Est. 1911

the dtic Department: Trade, Industry and Competition REPUBLIC OF SOUTH AFRICA

the dpsa

HILTON COLLEGE

public works

Robben Island

SABC NEWS Independent. Impartial.

Post Office South Africa

Telkom

ArcelorMittal

PRIVATE SECTOR

Kimberly-Clark

aspen

Hollard.

avis budget group

Discovery

Mondelēz International

BAYER

Shell

BMW

Coca-Cola

Microsoft

THOMSON REUTERS

OUR GROUP EXECUTIVE LEADERSHIP TEAM

100+ years of combined experience.

Board of Directors

- Jonathan Broll *
- Savi Perumal * **
- Noluyolo Jekwa *
- Malcolm Horne (Group CEO)
- Elscke Badenhorst (Group CFO)
- Royden Du Plooy * **

* Non – Executive Director
** Alternate Director – R Du Plooy is an Alternate Director to S Perumal

Group CEO Malcolm Horne

Group CFO



Elscke Badenhorst

- Group Finance
- Group Legal
- Group Risk
- Group IT
- Company Secretary

COO: Cushman & Wakefield | BROLL



Ken Gerber

- Occupier Services
- Strategy & Consulting
- Transaction Services
- Client Solutions
- Valuations & Advisory
- Capital Markets
- Internal Developers (separate legal entity)
- Broll Auctions & Sales (separate legal entity)
- Broll Risk Management (separate legal entity)

COO: Property Management



Surine Griffin

- Property Management
- Retail Leasing
- Sectional Title Management
- EWS (Energy, Water & Sustainability)

COO: Integrated Facilities Management



Mandla Msweli

- Integrated Facility Management Services
- Technical Services
- Soft Services (Cleaning, Hygiene, Landscaping & Pest Control)

Group Head: Public Sector



'Mantsi Moiloa

- Establishing & nurturing strategic ties in Local, Provincial, & National government (SA).

MD: Africa (excl. SA)



Inge Wessels

- Financial Oversight
- Market Expansion & Development
- Operational Management
- Stakeholder Relations

OUR GROWTH TRAJECTORY

Five decades of continued innovation.



1975

- Property Management

1995

- Retail Leasing
- Broking & Sales

2010

- Valuations & Advisory Facilities Management Occupier Services
- Intel/Research

2018

- Auctions & Sales





2019

- 51% Black Women Owned & Level 1 B-BBEE (SA)
- Cushman & Wakefield Affiliation with our Occupier Services Division
- Internal Developers (Workplace Strategy)

2020

- Broll Soft Services (BSS)
- Broll Risk Management

2022

- Broll EWS (Energy, Water & Sustainability)
- Acquisition of ARM - plumbing, electrical and maintenance
- A JV with Driway International - a tech solution for industrial damp issues



Two Decades of Africa Expansion

2003 Namibia
2004 Nigeria
2006 Ghana
2007 Malawi
2013 Rwanda
2013 Indian Ocean
2013 Mauritius
2013 Kenya
2013 Zambia
2014 Botswana
2014 Zimbabwe
2015 Ivory Coast
2015 Mozambique
2015 Uganda
2018 Gabon
2024 Egypt



OUR GROUP ACCOLADES

Decades of industry recognition for excellence.

2016

Broll Property Group

Advisors and Consultants –1st place in Africa - Euromoney Awards

Advisors and Consultants for Agency/Letting – 1st place - Euromoney Awards

Advisors and Consultants for Research – 1st place - Euromoney Awards

Broll South Africa

Advisors and Consultants – 1st place in Africa - Euromoney Awards

Advisors and Consultants for Agency/Letting – 1st place - Euromoney Awards

Advisors and Consultants for Valuation – 1st place - Euromoney Awards

Broll Ghana

Real Estate Advisors and Consultants – 1st place - Euromoney Awards

Advisors and Consultants for Agency/Letting – 1st place - Euromoney Awards

Advisors and Consultants for Valuation – 1st place - Euromoney Awards

Advisors and Consultants for Research – 1st place - Euromoney Awards

Property Management Firm of the Year - Ghana Property Awards

Broll Nigeria

Advisors and Consultants for Agency/Letting – 1st place - Euromoney Awards

Advisors and Consultants for Research – 1st place - Euromoney Awards

2017

Broll Facilities Management
PMR Silver Arrow Award - National Survey on External Facilities Management Companies

2018

South Africa Facilities Management Young Achiever of the Year - Gold - Chanté Jordaan

Kenya Facilities Management Young Achiever of the Year - Gold - Jacklyn Mwangi

Woman's Property Network - Professional of the Year – Jess Cleland

Admitted as an Advocate Fathima Karolia

Broll Nigeria

Real Estate Service Company of the Year

2019

Broll Namibia

Great Place To Work – Small Business Category - 4th Place

Broll Facilities Management

PMR Gold Arrow Award - National Survey on External Facilities Management Companies

Broll Property Group

PMR Gold Arrow Award - National Survey on External Facilities Management Companies

2020

Broll Property Group

Advisors and Consultants for Agency - Letting/sales - 1st place in Middle East – North Africa - Euromoney Real Estate Survey

Advisors and Consultants for research - 1st place in Middle East – North Africa - Euromoney Real Estate Survey

3rd overall in Middle East – North Africa - Euromoney Real Estate Survey

Broll Facilities Management

PMR Gold Arrow Award - National Survey on External Facilities Management Companies

Broll Nigeria

Advisors and Consultants - 1st place in Nigeria - Euromoney Real Estate Survey

Advisors and Consultants for Agency - Letting/sales - 1st place in Nigeria - Euromoney Real Estate Survey

Advisors and Consultants for Research - 1st place in Nigeria - Euromoney Real Estate Survey

2022

Malcolm Horne (Group CEO) Awarded "Africa CEO 2022 - Industry Category Winner - Real Estate" by CEO Today Magazine

Broll Property Group
Euromoney Awards 2022, first in the following categories:
- Advisors & Consultants: Overall (Africa)
- Letting/Broking & Sales (Africa)
- Property Valuations (Africa)

Malcolm Horne (Group CEO) African Property Investment (API Events) honoured with a Lifetime Achievement Award.

Broll Facilities Management
PMR Gold Arrow Award – National Survey on External Facilities Management Companies

Broll Ghana
Ghana Club 100 Awards, Top 100 outstanding companies in Ghana

2023

Broll Property Group

MEA Business Awards - Best Commercial Property Services – Africa

Broll Facilities Management
PMR Gold Arrow Award – National Survey on External Facilities Management Companies

Broll Uganda
Consumer Choice Awards - Platinum Winner - Best Real Estate Consultants & Developers Company

Broll Ghana –
Ghana Club 100 Awards – Top 100 Prestigious Companies

2024

Broll Ghana
Ghana Club 100
Business Awards

Internal Developers (a wholly-owned subsidiary of Broll Property Group):
CIDB - Empowerment and Recognition of Women in Construction Awards - Interior Design & Build Project of the Year

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MULTIPLE LAYERS AT THE CORE

Vertically integrated services that create lasting value.



CLICK TO JUMP TO RELEVANT SERVICE


broll
A LEGACY OF LEADING
50 YEARS
ANNIVERSARY
TRUSTED TO MANAGE.
DRIVEN TO PERFORM.
PROPERTY MANAGEMENT

OUR PROPERTY MANAGEMENT CAPABILITIES

Shaping Africa's Professional Real Estate Market for 50 Years.

broll

1 MILLION+ SQM SECURED

On the 01st July, our Property Management is taking on over 1 million square metres of new property under management.

TOP REASONS FOR RECENT APPOINTMENTS

CAPACITY.
PROFESSIONALISM.
EXECUTION.
CONSOLIDATION.
STRATEGY.
COST SAVINGS.

3,211
Retail Lease Renewals

1,600
New Leases Concluded

667,000 m2
New Retail Space Leased Across Africa (Past 3 Years)

21
New Developments Leased (Past 5 Years)

Gross Revenue Billed
$640m

$565m
Gross Income Billed to Tenants

$220m
Third Party Expenses Managed

4m
Litres of Water saved per month

$1,2m
Credits in billing corrections

30%
Cost Savings on Water Projects

1,200
Properties Under Management

22,5m m2
Space Under Management

33,700
Managed Tenants

449
Shopping Centres Managed

PROPERTY MANAGEMENT

Robust range of investor services designed to drive real estate performance and asset value.

broll

Our Value Proposition

No other independent service provider has Broll's expertise and proven track record when it comes to property management in South Africa – since 1975! We deliver superior returns - something that we've consistently achieved, even in the toughest of market conditions.

That's why some of Africa's largest portfolios, both listed and private are entrusted us with their assets.

VUKILE PROPERTY FUND · FORTRESS REIT LIMITED · RESILIENT · EMIRA PROPERTY FUND

SA CORPORATE REAL ESTATE · FAIRVEST PROPERTY HOLDINGS · PARETO GROWING PLACES · GROWTHPOINT PROPERTIES

Lango · Flanagan & Gerard · actis · grit Real Estate Income Group

Professional Industry Associations

- Estate Agency Affairs Board (EAAB)
- South African Council of Shopping Centre (SACSC)
- South African Property Owners Association (SAPOA)
- South African Institute of Black Property Professionals (SAIBPP)
- Institute of Real Estate Management (IREM)
- Green Building Council of South Africa (GBCSA)

Our Services

- Property Management
- Retail Leasing & Consulting
- Lease Renewal Negotiations
- Vacant Space Management
- Project Management
- Tenant Co-ordination
- Manage Buildings For Sustainability
- Carbon Intelligence Advisory
- Energy Consumption Management & Efficiencies
- Insurance Compliance
- Financial Accounting & Management
- Accounts Payment
- Building Sales & Feasibilities
- Datamart Licences For Asset Management
- Service Provider Accreditation, Procurement & Management
- Commercial, Residential & Leisure Management Services
- Budgeting & Forecasting Maintenance Management Risk & Compliance
- Sectional Title Property Management
- Strategic Brand Advisory Services, Communication, Marketing Implementation, Research & Campaigns



ENERGY, WATER & SUSTAINABILITY

From meaningful change to measurable value.

EWS | Energy, Water & Sustainability

Our Value Proposition

We provide comprehensive energy efficiency solutions to optimise building performance, reduce carbon emissions, and enhance operational sustainability. Our offerings include tailored strategies to mitigate energy and water consumption, streamline waste management, and bolster electricity and water security. By implementing green building initiatives and fostering resource efficiency, we support local government and international commitments to environmental sustainability and climate change mitigation. Additionally, we facilitate the procurement and integration of cutting-edge renewable energy technologies across our client's facilities, ensuring a holistic approach to sustainable development.

Professional Industry Associations

- International Renewable Energy Agency (IRENA)
- Sustainable Energy Society of Southern Africa (SESSA)
- Green Building Council South Africa (GBCSA)
- Renewable Energy Independent Power Producer Procurement Programme (REIPPPP)
- South African Renewable Energy Technology Centre (SARETEC)
- South African National Energy Development Institute (SANEDI)
- South African Council of Shopping Centre (SACSC)

Our capabilities position us as the **go-to partner for sustainable energy and water solutions**, ensuring businesses across Africa achieve **efficiency, resilience, and regulatory excellence.**

Our Services

Renewable Energy Integration & Planning

Energy Efficiency & Sustainability Strategy Development

ISO 50001 Energy Management Plan Implementation

Energy Performance Certificate Generation

Measurement & Verification Activities

Performance Contracts

Utility Management & Recovery Optimisation

Energy Efficiency Project Implementation

Renewable Energy Projects

Portfolio Reporting & Benchmarking

Sustainability Reporting

Training

Shared Savings Programmes

Power Quality Studies

Thermal Imaging Studies

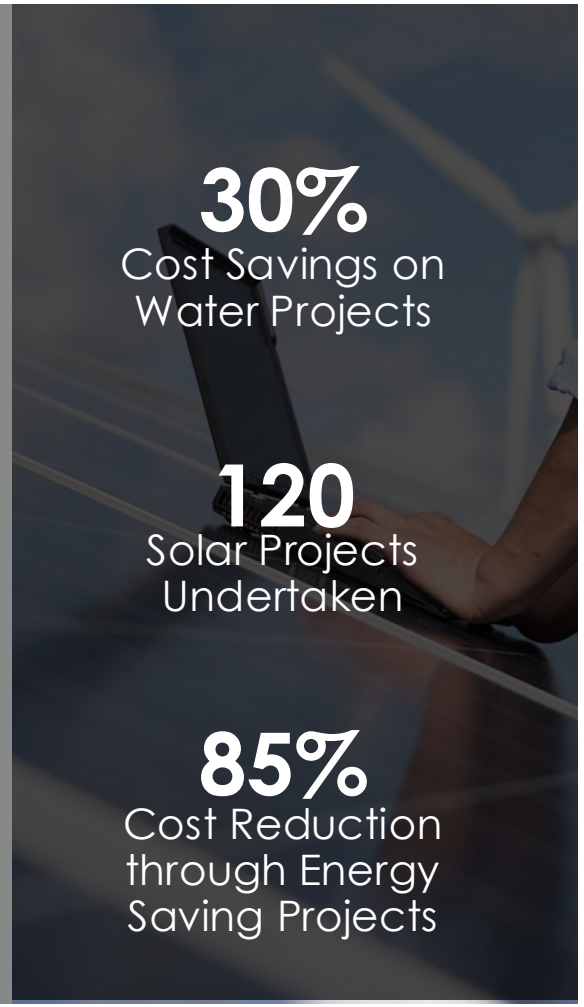
Tariff Optimisation

Water Management & Conservation Monitoring, Strategy and Reporting

Negotiation of Debt

Smart Meter Portal Subscriptions

Indoor Air Quality Solutions



30%
Cost Savings on Water Projects

120
Solar Projects Undertaken

85%
Cost Reduction through Energy Saving Projects

BRANDVISORS™ (Mall Marketing & Communications)

We align brand strategy and asset strategy to create opportunities for growth.

brandvisors
marketing · brand · communication

Our Value Proposition

A turnkey marketing solution that includes in-house marketing, events, and brand strategy. Let us be your voice, it's not just what you say but how you say it. As specialists in retail marketing, leverage off our diverse brand advisory, promotional, media, digital, and non-GLA income strategies into a profit centre for your asset!

Our marketing roots run deep, and our branches of creativity stretch out far beyond the rest.

CEDARSQUARE

blue route mall

MLAZI MEGA CITY
azide ethaya

MALL OF Africa

FOURWAYS MALL

cradlestone MALL

Our Services

- Launch Strategies Of Newly Built Shopping Centres
- Re-launch Strategies Of Renovated & Re-Engineered Shopping Centres
- Annual Marketing Strategies
- Retail Intervention Strategies
- Brand Strategies
- On-site Marketing Management
- Communication Strategies
- Disaster Management Communication Plan
- Campaign Management
- Campaign Creative Development
- Digital & Social Media Marketing
- Marketing Budget Management
- Exhibitions & Display Management
- Non-GLA Strategy: Service Provider Management
- Sponsorship Opportunities Planning & Income Stream Management
- Service Ambassador Training
- Supplier Development
- Media Strategy, Buying & Budget Optimisation
- Event Strategy, Planning & Execution



SNAPSHOT OF REAL ESTATE PORTFOLIOS UNDER MANAGEMENT

With a Total Value of $18.2bn Assets Under Management.

broll

RESILIENT

26 PROPERTIES

1,064,457 m²

19 Years

FORTRESS

36 PROPERTIES

84,033 m²

19 Years

SA CORPORATE REAL ESTATE

50 PROPERTIES

479,698 m²

12 Years

sasol

4 PROPERTIES

338,452 m²

10 Years

VUKILE PROPERTY FUND

17 PROPERTIES

330,463 m²

10 Years

FAIRVEST PROPERTY HOLDINGS

35 PROPERTIES

235,172 m²

7 Years

EMIRA PROPERTY FUND

53 PROPERTIES

565,983 m²

5 Years

actis

5 PROPERTIES

128,667 m²

5 Years

Lango

53 PROPERTIES

565,983 m²

5 Years

SENTINEL

1 PROPERTY

16,258 m²

~ 1 Year

grit

Real Estate Income Group

26 PROPERTIES

288,882 m²

~ 1 Year

Flanagan & Gerard

4 PROPERTIES

193, 483 m²

~ 1 Year

OVER 4 MILLION SQM OF REIT ASSETS UNDER MANAGEMENT.

Africa's REIT Specialist.

broll

GLA BY PROPERTY TYPE for REITS

RETAIL

3.2m m²

OFFICES

348,191 m²

INDUSTRIAL

584,984 m²

HOSPITALITY

38,029 m²

RESIDENTIAL

25,717m²

HEALTHCARE

5,460 m²

DIPLOMATIC HOUSING

49, 639m²

DATA CENTRES

994 m²

Proud custodians of direct relationships with

LOCAL & INTERNATIONAL TENANTS

PROVEN TRACK RECORD

Our track record speaks to a result where we drive towards maintaining

90% tenant retention.

JIMMY CHOO
ZARA
KURT GEIGER
adidas
TRUWORTHS
DOLCE & GABBANA
WOOLWORTHS
SPAR
BOSS
HUGO BOSS
PEPKOR
Pick n Pay
FOOD LOVER'S MARKET
GUCCI
Nando's
FOURNOS
poetry
VANS
BURGER KING
Dis-Chem
EMPORIO ARMANI
CLICKS GROUP LIMITED
NIKE
MICHAEL KORS
Pringle OF SCOTLAND
CAPE UNION MART Est. 1933
PANDORA
SWAROVSKI
TFG
Levi's
GUCCI

OUR CLIENT'S TESTIMONIALS



grit
Real Estate
Income Group

Listed on London Stock Exchange &
Stock Exchange of Mauritius

broll

"We appointed Broll as our strategic partner to optimise operations. Broll is responsible for managing all of Grit's assets, **valued at $812 million.** This long-term partnership aims to deliver **annual cost savings of around USD 1 million**, allowing Grit to focus on its core expertise in impact real estate development and asset management initiatives.

By leveraging Broll's extensive database, footprint, systems, and expertise, Grit will accelerate vacancy filling and enhance portfolio rental collections.

This partnership **unlocks meaningful economies of scale**, and importantly, finds a way for Grit to fully focus on impact real estate development and asset management."

Bronwyn Knight
Grit Founder & Chief Executive

broll

"Broll has a unique ability of keeping up **high levels of communication between landlord, tenants and all stakeholders involved**, and have always managed to minimise the risks involved and yet still always deliver a quality shopping experience to the public. "

Vuso Majija, Retail Executive Director
Fortress Income Fund

Broll always show their utmost ***dedication and resilience****, especially during trying times.*

They remain consistent, and always ensure that all our centres are managed well and ***deliver a quality service to all tenants and shoppers.***

Johann Kriek
Executive Director, Resilient REIT Limited

74th most valuable stock on the Johannesburg Stock Exchange (JSE)


broll
PROPTECH
INTELLIGENT INSIGHTS. MAXIMUM VALUE.
THE SMART WAY TO MANAGE PROPERTY.
AI, RESEARCH & PROPTECH SOLUTIONS

BROLLTECH™

Enabling real-time, data-led decisions.

Our Value Proposition

We allow technology to lead the way in serving the rapidly changing needs and requirements of our clients, and the market. Our real estate related technologies are distinctive in creating and delivering real value.

Our in-house IT team ensures integration synergies across the continent, leveraging combined systems and aggregated data for continuous improvement.

Integrated PropTech Solutions Providing:

- Improved information quality.
- Better transparency on portfolio performance.
- Enables faster decision making.
- Anticipated trends to inform planning and strategy.
- Identification of risks and opportunities.
- Integrates resources, skills and people on-the-ground.

Multiple Platforms Offered and Supported:

- B# (Broll Online)
- Straight-line reporting automated.
- IFRS16 solution projects.
- ISO 9001:2015 certification underway.

Our Services

Dedicated technology development team

Software development

Mobile apps

Data migration

Information security audits

Software development

Disaster recovery & business continuity

Digital framework risk audits

Support & training

Bulk batch data cleaning

System Statistics

200+ Call centers/fault centers

4,000+ Calls/faults per month



b#

Tech-led real estate solution to maximise your assets.

Our Value Proposition

b# is the leading real estate solution that seamlessly integrates property and facilities management with financial and business intelligence. Don't just manage your real estate – maximise your assets. Imagine countless manhours saved, predictive patterning, consistent reporting, and streamlined processes.

Integrated Solution Providing:

- Fully integrated "ready to go" platform; integrating tenants, landlords, property managers all into a single view platform.
- Robust Microsoft Architecture.
- Information anytime, anywhere on any device securely.
- Empowering the mobile workforce, enhancing efficiency and information accuracy.
- System employs role based as well as building level security.
- All activity and actions are contained in audit trails.
- Adaptable and flexible, capable of integrating into any third-party system.

Market leading proprietary software:

- Real-time asset management
- Financial reporting
- Admin control
- Budgets
- Multiple building portfolio
- Multi-currency financial software
- Debtors' journals
- Document centre
- Fault centre
- GL account
- Queries/journals
- Lease admin & tracking
- Turnover reporting & analysis
- Multiple premises procurement management
- Receipting
- Live reporting
- Retail management suppliers
- Tenant queries
- Utilities management & reporting



RESEARCH & INTEL

Reliable sector-specific industry intelligence.

Our Value Proposition

The role of today's real estate company has evolved. Intel is the the new commodity. Now, more than ever, we need to interpret, evaluate and disseminate information quickly before it becomes stale. Broll recognises this need and invests heavily in intel gathering so as to provide its clients with the level of information necessary to make the best decisions.

Broll has extensive industry experience in research-based real estate consulting and advisory services. Our high-performance teams conduct unique market analyses, which provide relevant insights about different market segments. These insights enable our clients to make informed, strategic and data-driven decisions.

Sector Access

Commercial

Retail

Industrial

Our Services

Country Reports

Market Studies

Location & Nodal Analysis/Reports

Feasibility Studies

Retail Mapping

Portfolio Optimisation & Analysis

Benchmarking

Demographic Analysis

Drive-time Analysis

Competitor Locations

Repositioning Or Relocating Of Stores Within A Shopping Centre

Development Pipelines

Lease Optimisation, Acquisition & Renewals

Tenure Optimisation

Tenant Represented Research

Transaction Workflow Tracking

Geospatial Analytics:

Trade Zone & Catchment Analytics

Revenue Prediction

Optimization

Outlier Analytics Model For QSR

Store Maturity

Cannibalization

Data Driven Classification

Distance Decay

Geocoding & Spatial Mapping




broll
A LEGACY OF LEADING
50 YEARS
ANNIVERSARY
STRATEGIC REAL ESTATE ADVISORY.
DONE RIGHT.
CORPORATE REAL ESTATE SERVICES

OCCUPIER SERVICES

People-Centred. Technology-Enabled. Knowledge-Based.

Our Value Proposition

Our clients get the support of all of our well-established technology platforms, processes and skilled account teams, to best deal with the business challenges and priorities linked to their property life cycle.

We understand the end-to-end real estate management process, ensuring our clients' portfolios are fit for purpose, compliant and as efficient as possible.

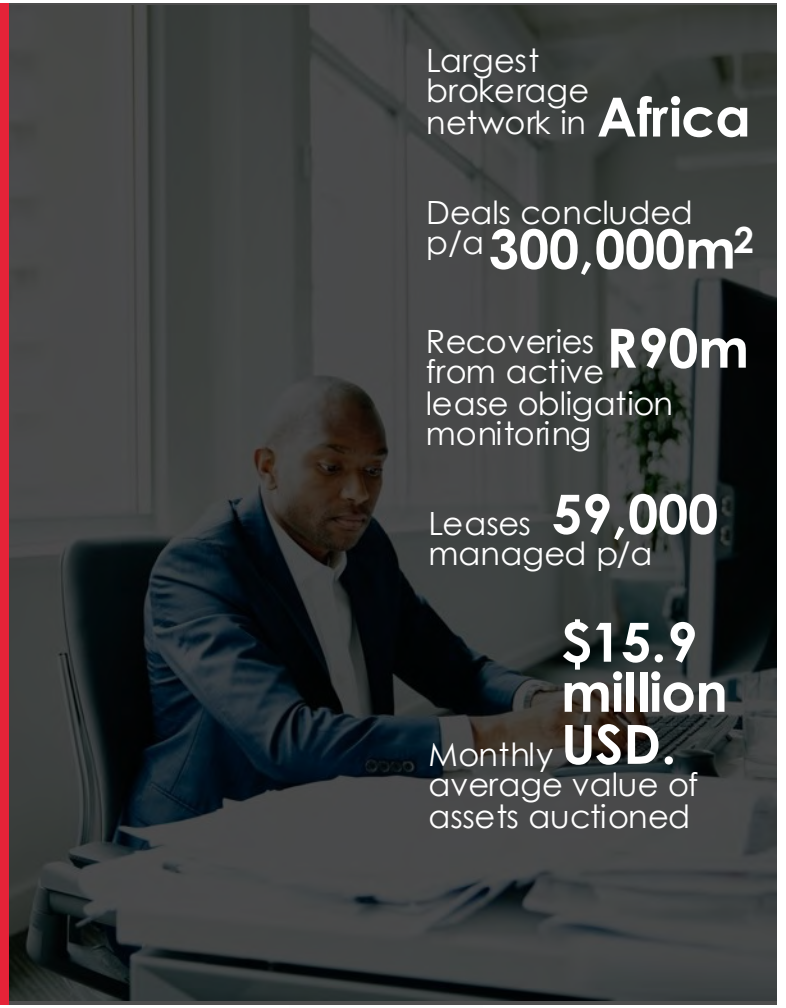
Drawing from the global stage experience of our affiliate partners, *Cushman and Wakefield*, we deliver matchless property-transaction acumen in commercial and industrial real estate strategy, investment broking, and asset acquisition and disposal.

Professional Industry Associations

- Corporate Office Real Estate Network (CoreNet)
- South African Council of Shopping Centres (SACSC)
- South African Institute of Auctioneers (SAIA)
- The Institute of Risk Management South Africa (IRMSA)

Our Services

- Portfolio Management
- Lease Administration
- Vacancy/Sub-tenant Management
- Critical Date Monitoring
- Dilapidation Negotiations
- Estates Management
- Accounts Payable/Receivable
- Payment Reconciliations & Recovery
- Budgeting/ Forecasting
- Cash Flow Planning
- Financial Reporting
- Data Management Solutions
- Location Analysis & Network Planning



OUR OCCUPIER SERVICES CAPABILITIES

Real Estate That Works Harder.

broll

19 000 leases under management in SA

$183m Treasury annual payments

80+ Strategy & transaction business cases per year

$3,5bn Assets under management

1 000+ Deals per year

600+ Leases managed (RoA)

$63m Treasury annual receipts

300 000 m² of deals per years

Our consolidation solutions:

40% cost savings

75% reduction in regional footprint

EXPERT CORPORATE REAL ESTATE EXPERIENCE

Driving value through strategic occupier services.

broll



Discovery, Sandton
110 000m²



Accenture, Waterfall
4 000m²



IBM, Johannesburg
14 000m²



EY, Cape Town
4 000m²



Ericsson Waterfall
3 500m²



Absa, Sandton
36 000m²



Bryte, Johannesburg
7 000m²



Discovery, Cape Town
8 300m²



The Business Exchange, National
6 000m²



Mitsui & CO, Johannesburg
1 400m²



BP, Johannesburg
6 000m²



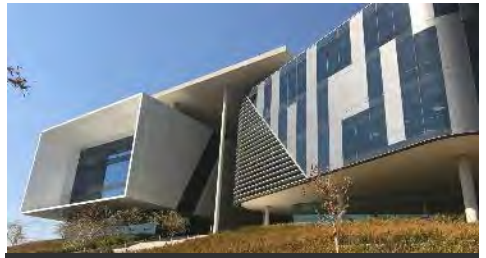
Publicis Groupe
13 000m²



EY, Sandton
23 000m²



Sasol, Johannesburg
6 800m²



Dell, Midrand
1 500m²

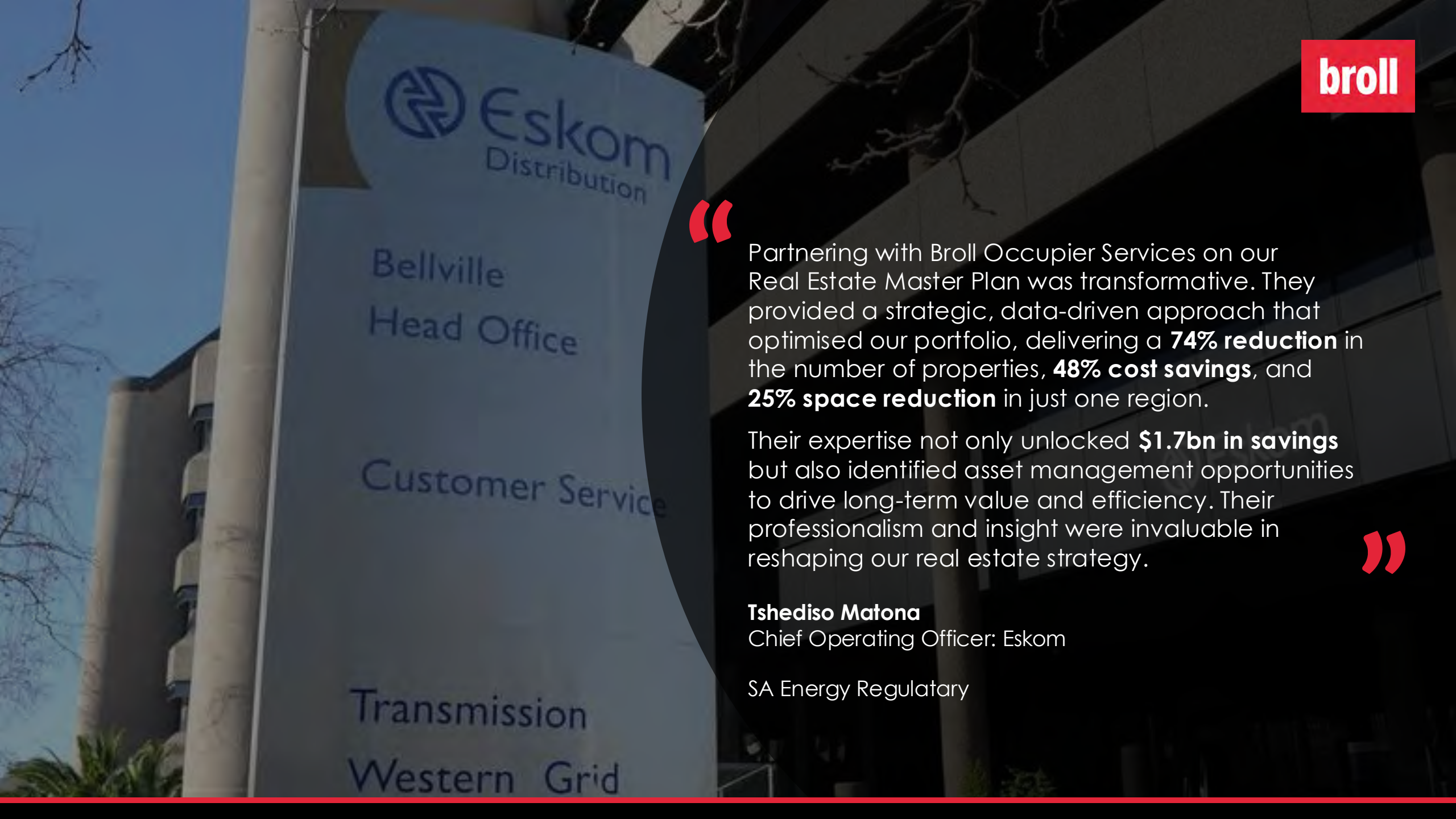


broll

"Just as Discovery is known for its innovative capabilities, we have found that Broll match that attribute in the **real estate services** and advice they provide, resulting in **substantial savings** over the years.

The Broll team are stable, yet **dynamic**, **proactive** and energetic in meeting our real estate requirements."

John Robertson
Executive Director: Discovery Holdings



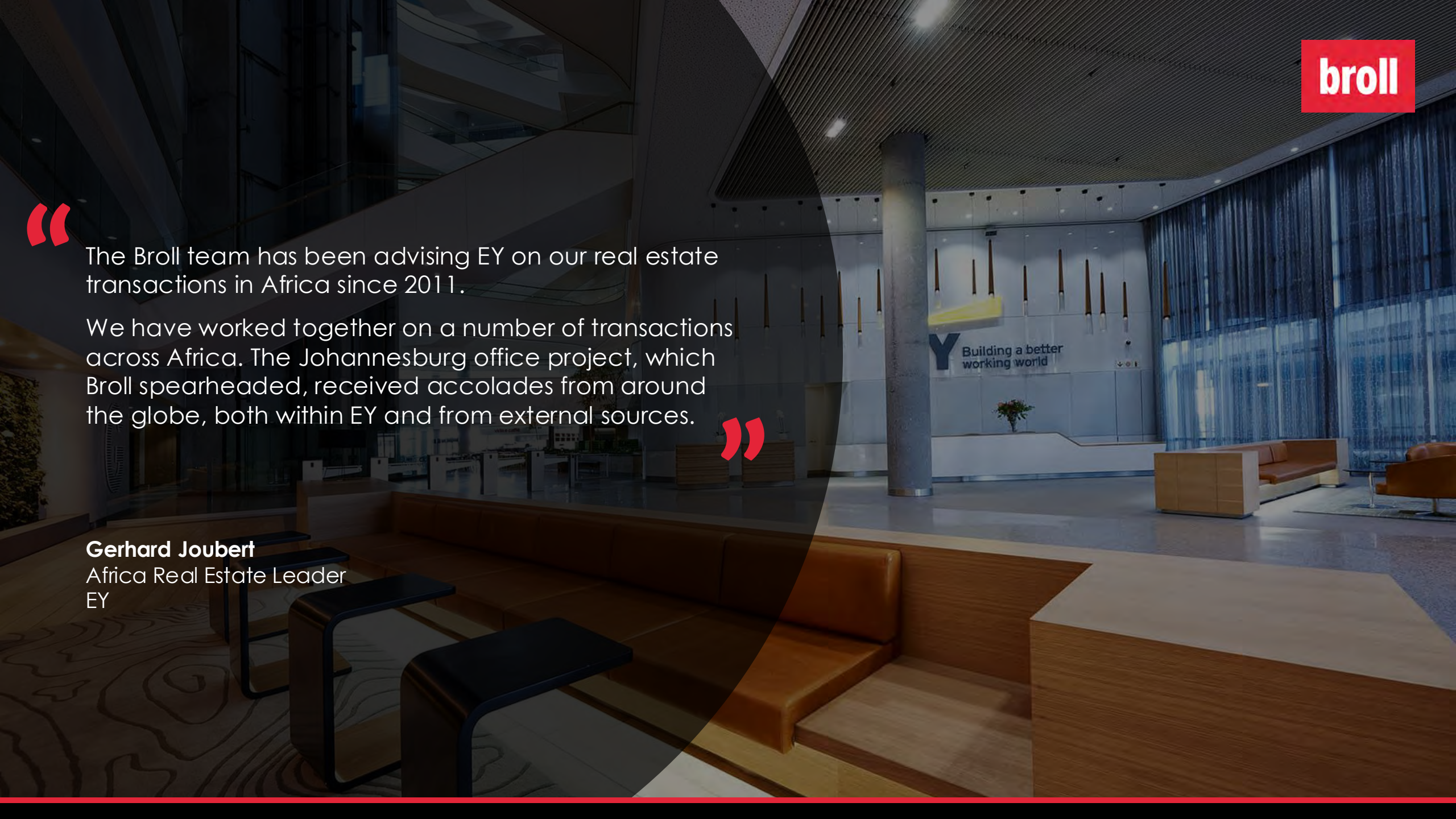
broll

"Partnering with Broll Occupier Services on our Real Estate Master Plan was transformative. They provided a strategic, data-driven approach that optimised our portfolio, delivering a **74% reduction** in the number of properties, **48% cost savings**, and **25% space reduction** in just one region.

Their expertise not only unlocked **$1.7bn in savings** but also identified asset management opportunities to drive long-term value and efficiency. Their professionalism and insight were invaluable in reshaping our real estate strategy."

Tshediso Matona
Chief Operating Officer: Eskom

SA Energy Regulatary



broll

"The Broll team has been advising EY on our real estate transactions in Africa since 2011.

We have worked together on a number of transactions across Africa. The Johannesburg office project, which Broll spearheaded, received accolades from around the globe, both within EY and from external sources."

Gerhard Joubert
Africa Real Estate Leader
EY

TRANSACTION MANAGEMENT SERVICES

Our skilled negotiators get you more.

Our Value Proposition

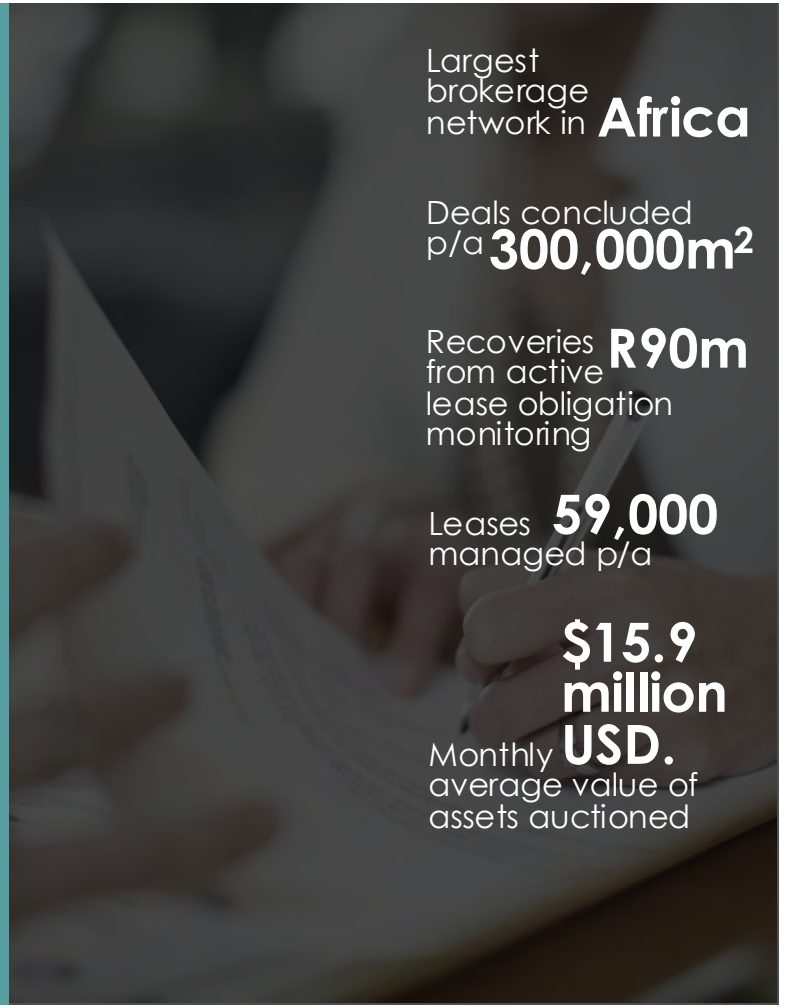
Our Transaction Services division is responsible of the objective to reduce occupancy costs and improve flexibility across competitive and changing markets for clients. Whether it's office, industrial, retail or data centre markets, we assist with new lease negotiations, purchases, disposals, renewals, lease restructures, subleasing and rental benchmarking. This translates to you achieving the most favourable outcome when it comes to your long-term strategy and workplace goals.

VALUES TO FEE RATIO

16:1 Skilled **Negotiators**, Excellent Service **Delivery.**

Our Services

- Brokerage
- Acquisitions & Disposals
  Lease benchmarking
- Extensive Market Analysis
- Workflow Tracking
- Portfolio Optimisation
- Lease Document Completion
- Lease Optimisation
- Lease Renewals, Restructuring & Exit Negotiations



STRATEGY & CONSULTING

Our acumen and experience simplifies your decision making.

Our Value Proposition

We unite the excellence of our daily deal-making, market intelligence and innovative strategies to deliver portfolio solutions that enable easier client oversight, better control and optimise value. Market requirements are increasingly complex, requiring a combination of solutions that dictate a high degree of business acumen to every assignment.

This growing service provides cross-functional integration to craft bespoke solutions for investors and occupiers to craft wealth creation and portfolio optimisation.

Notable Recent Transactions

- Vodacom, Johannesburg 18,000m^2 (Industrial Broking).
- R450m sale of Pick n Pay Hyper, Cape Town on behalf of Zenprop. (Investment Broking).
- Mail and Guardian, Johannesburg 3,000m2 (Office Broking).
- Citi Group – 3-year transaction/ tenant representation contract.

Professional Industry Associations

- Corporate Office Real Estate Network (CoreNet)
- South African Council of Shopping Centres (SACSC)
- South African Institute of Auctioneers (SAIA)
- The Institute of Risk Management South Africa (IRMSA)

Our Services

- Market studies
- Feasibility studies
- Highest and best use assessments
- Portfolio optimisation strategies
- Property performance assessments
- Stay vs Go strategies
- Own vs Lease strategies
- Site selection/location advisory services
- Asset management strategies
- Balance sheet restructures using real estate
- B-BBEE property strategies
- Reports for capital raising submissions
- Reports for Competition Commission submissions
- Capital expenditure business cases



VALUATION & ADVISORY SERVICES

Global multi-sector experience at your service.

Our Value Proposition

We offer a highly professional service for the valuation of land and buildings, which includes real rights, servitudes and usufructs. Valuations are also provided for sales and acquisitions, financial reporting, rental valuations, rating appeals and for insurance purposes. Additional services include due-diligence audits for property acquisitions and development appraisals. Our expertise extends into Sub-Saharan Africa with valuers based in Kenya, Ghana, Nigeria, Uganda and Mauritius.

Our broad based team includes Chartered Surveyors and Professional Valuers registered with both the South African Council for the Property Valuers Profession and the South African Institute of Valuers. We comply with international best practice as set out in the RICS Red Book and with the guidelines adopted by the International Valuation Standards Committee. Our valuers and our firm are RICS registered and have been operational since 1968.

Professional Industry Associations

- Royal Institution of Chartered Surveyors (RICS)
- International Valuations Standards Council (IVSC)
- South African Institution of Valuers (SAIV)
- South African Council of Shopping Centre (SACSC)
- South African Property Owners Association (SAPOA)

Our Services

What we value

Offices

Retail centres

Hotels

Industrial

Residential

Development land

Fuel stations

Specialised properties

Why we value

Sales & acquisitions

Financial reporting

Objections

Due diligences

Decision making

Secured lending

Whom we value

REITS & listed property companies

Developers

Private funds

Operational property

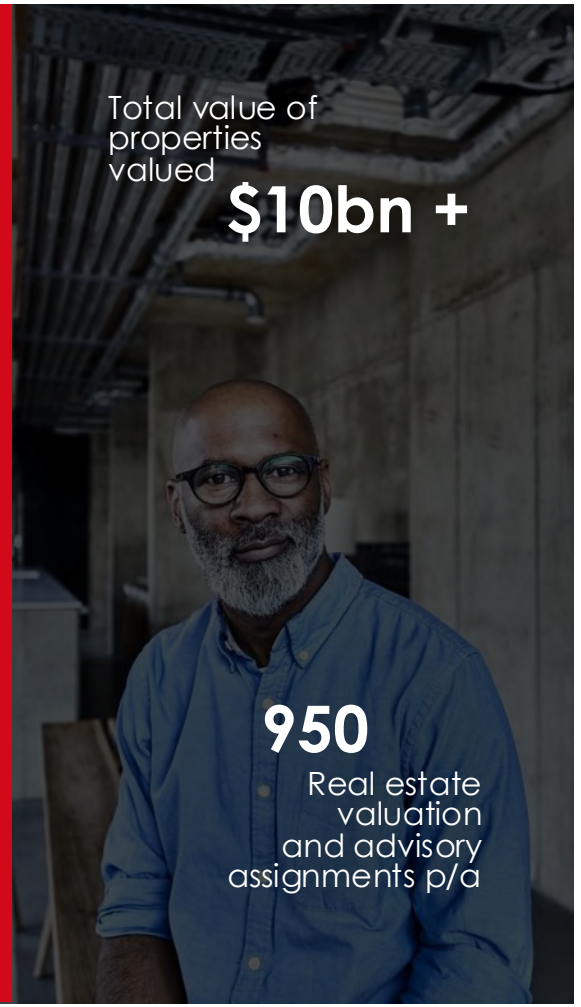
Multinationals

Notable Recent Transactions

Sasol Pension Fund – Quarterly Financial Reporting of Property Portfolio

PIC – Adhoc Market Valuations of Investment and Development Properties

Tongaat Hulet – Adhoc Market Valuations of Development Land



Barloworld Leading brands · Sanlam · updc · LIBERTY · Redefine Properties · sasol · Improvon · actis · absa · Standard Chartered · Coca-Cola

WORKPLACE SOLUTIONS

Strategy | Design | Projects

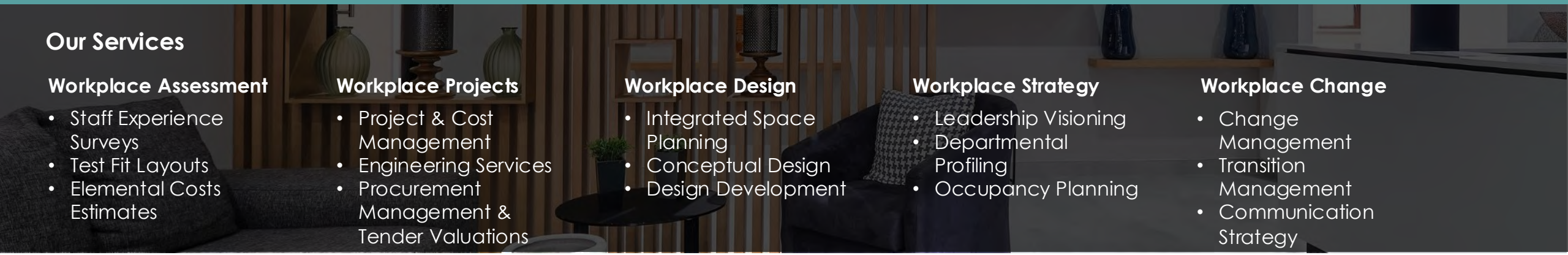
id. work

Our Value Proposition

We're 360 workplace strategists, a team of multi-disciplinary consultants. We consider where people work and how people work - and how that relates to business culture, efficiency, and profitability. We incorporate both Workplace Strategy and Design + Build to deliver successful projects to our clients.

We take a total view of an organisation, and spend time studying its people, future plans, and brand ambitions. This is workplace strategy as it should be done: a data-driven, research-led process that results in creatively relevant, profit-generating solutions. Your space is an investment.

Through our workplace services teams we can fulfil all the typical roles of the project team, including project management, interior design, furniture procurement, building, engineering services, cost consultancy and capital allowances.



Our Services

Workplace Assessment

- Staff Experience Surveys
- Test Fit Layouts
- Elemental Costs Estimates

Workplace Projects

- Project & Cost Management
- Engineering Services
- Procurement Management & Tender Valuations

Workplace Design

- Integrated Space Planning
- Conceptual Design
- Design Development

Workplace Strategy

- Leadership Visioning
- Departmental Profiling
- Occupancy Planning

Workplace Change

- Change Management
- Transition Management
- Communication Strategy

the dpsa Department: Public Service and Administration REPUBLIC OF SOUTH AFRICA · McDonald's · Hollard. · FINASTRA · Abbott · THEBE INVESTMENT CORPORATION · SGS · KANTAR

CAPITAL MARKETS

Global multi-sector experience at your service.

Our Value Proposition

Broll's Capital Markets team sources buyers and sellers for South African and Sub-Saharan real estate assets, dealing with clients who have an ongoing real estate requirement throughout the property investment lifecycle. We pride ourselves on great efficiency and have built a reputation for proactively identifying opportunities and first-class execution.

Our capital markets and leasing knowledge combine to provide proactive insights to unlock value and drive enhanced returns for real estate investment trusts, developers, unlisted private funds, corporate investors, institutions and individual investors.

Notable Recent Transactions

- R336m portfolio sale to Fairvest REIT, seller – Old Mutual
- R188m portfolio sale to Blend Property Group – seller Old Mutual
- 16 on Bree, Cape Town, R100m site assembly for residential tower
- IBM, Sandton, seller – IBM, buyer – Cavaleros R220m

Our Services

Capital Raising

Private placement facilitation

Buy/ Sell Side investment sales

B-BBEE optimisation

Disposal Advisory

Strategy and Transaction Advisory

Market study and research

Capital Raising

Private placement facilitation

Buy/ Sell Side investment sales

Disposal Advisory

Strategy and Transaction Advisory

Market study and research



RISK MANAGEMENT

Strategically mitigating risk across the continent.

BROLL RISK MANAGEMENT

Our Value Proposition

Our service delivery includes African Continental Advisory to Broll business units, delivery of strategic risk consulting to client portfolios and special projects regarding security risk technologies. This is combined with retained management consulting, to deliver complex systems to solve organisational risk across the spectrum on behalf of our clients.

Our defining feature is the ability to convert Capex spend into manageable Opex costs and in some instances, self-funding through optimisation and savings in the organisation.

A single-source service supplier for:

- Market Entry Risk
- Risk Management Consulting
- Business Intelligence
- Security & Safety Technologies

Notable Recent Transactions

- MTN Cameroon Audit Review
- RA International Africa Wide Risk Management Consultancy
- PPC Belden Market Entry Africa
- Idemia Road Safety Partner

Our Services

- Portfolio Management
- Lease Admin-istration
- Vacancy/Sub-tenant Management
- Critical Date Monitoring
- Dilapidation Negotiations
- Estates Management
- Accounts Payable/Receivable
- Payment Reconciliations & Recovery
- Budgeting/
- Forecasting
- Cash Flow Planning
- Financial Reporting
- Data Management Solutions
- Location Analysis & Network Planning



RETAIL TRANSACTION MANAGEMENT PLANNING

Skilled negotiators with your interest at heart.

Our retail tenant representative team negotiate the following, to ensure the best outcome for clients:

- Lease services - acquisitions and disposals
- Lease optimisation, renewals, sub-leasing and restructuring (re-gears)
- Turnkey lease documentation and completion
- Lease exit negotiation
- Portfolio optimisation
- Extensive market analysis (Rental benchmarking and savings)
- Correlation of strategic demographic inputs to determine required market rentals



PORTFOLIO MANAGEMENT

Let us handle the fine print for you.

Our Value Proposition

Our team of Estate Managers have extensive experience in understanding the obligations of lease agreements and leveraging this experience to achieve the best results for you. We further act as relationship managers between our clients and their facilities management team and landlords' support teams. We are focused on creating value driven outcomes in landlord-related matters and creating fit for purpose, and compliant premises.



Our Services

1. Portfolio Analytics & Updates
2. Customer & Employee Demographic Profiling
3. Lease Administration & Liabilities
4. Conflict Management
5. Variable Payments & Monthly Accrual Reporting
6. Financial Modelling / Cost Avoidance/ Savings Opportunities
7. Landlord/Tenant Queries & Complaints Resolution
8. Site Analytics & Inspections
9. Vacancy Management

VALUATION & ADVISORY SERVICES

Uncontested, knowledge-driven expertise in valuing.

Our Value Proposition

We offer a highly professional service for the valuation of land and buildings, which includes real rights, servitudes and usufructs as well as plant and machinery assets. Valuations are also provided for sales and acquisitions, financial reporting, rental valuations, rating appeals and for insurance purposes. Additional services include due-diligence audits for property acquisitions and development appraisals.

Our team includes Chartered Surveyors and Professional Valuers registered with both the South African Council for the Property Valuers Profession and the South African Institute of Valuers. We comply with international best practice as set out in the RICS Red Book and with the guidelines adopted by the International Valuation Standards Committee.

Professional Industry Associations

- Royal Institution of Chartered Surveyors (RICS)
- International Valuations Standards Council (IVSC)
- South African Institution of Valuers (SAIV)
- South African Council of Shopping Centre (SACSC)
- South African Property Owners Association (SAPOA)

Our Services

What we value

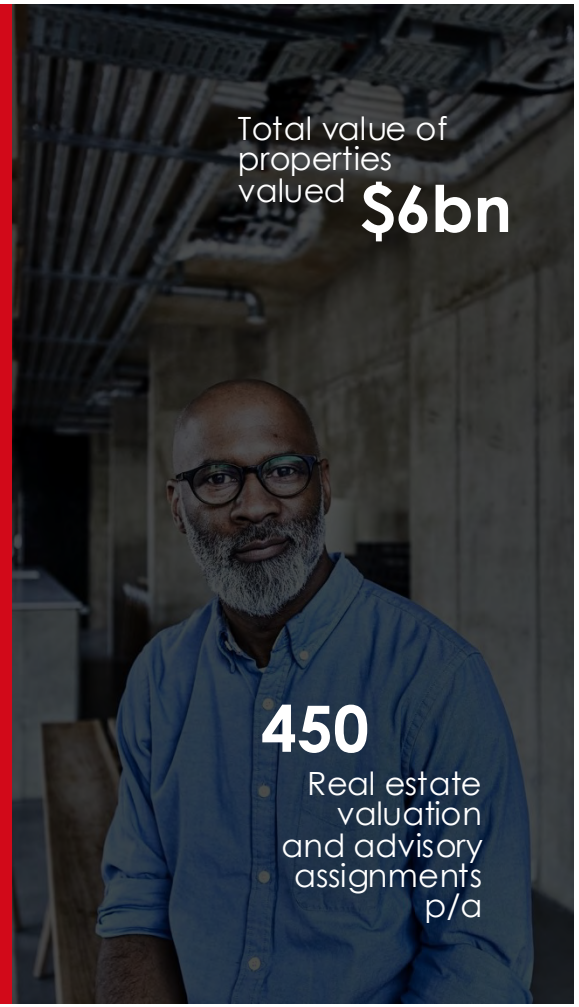
Offices
Retail Centres
Hotels
Industrial
Residential
Development land
Fuel Stations
Specialised Properties

Why we value

Sales and Acquisitions
Financial reporting
Objections
Due Diligences
Decision making
Secured lending
Processional Property Advise

Whom we value

REITS and listed property companies
Developers
Private funds
Operational property
Multinationals



Barloworld Leading brands
Sanlam
updc
LIBERTY
REDEFINE PROPERTIES
sasol
IMPROVON
actis
absa
Standard Chartered
Coca-Cola

AUCTIONS & SALES

Your Property. Our Platform. Optimal Results.

Our Value Proposition

We specialise in the auction and sale of all types of commercial real estate. We leverage cutting-edge technology and commercial expertise to streamline the buying and selling process, providing an exceptional experience for our clients. With over 50 years of experience, we have a successful history of selling billions of Rand's worth of commercial property using our platforms.

A vast network and deep understanding of the continent's diverse markets empower us to deliver exceptional results for your property disposals. Our expertise lies in identifying, understanding and executing the optimal sales strategy for any given property.

Professional Industry Associations

- SAIA (South African Institute of Auctioneers)
- Royal Institution of Chartered Surveyors (RICS)
- South African Council of Shopping Centre (SACSC)
- South African Property Owners Association (SAPOA)
- EAAB / PPRA (Estate Agency Affairs Board / Property Practitioners Regulatory Authority)

Our Services

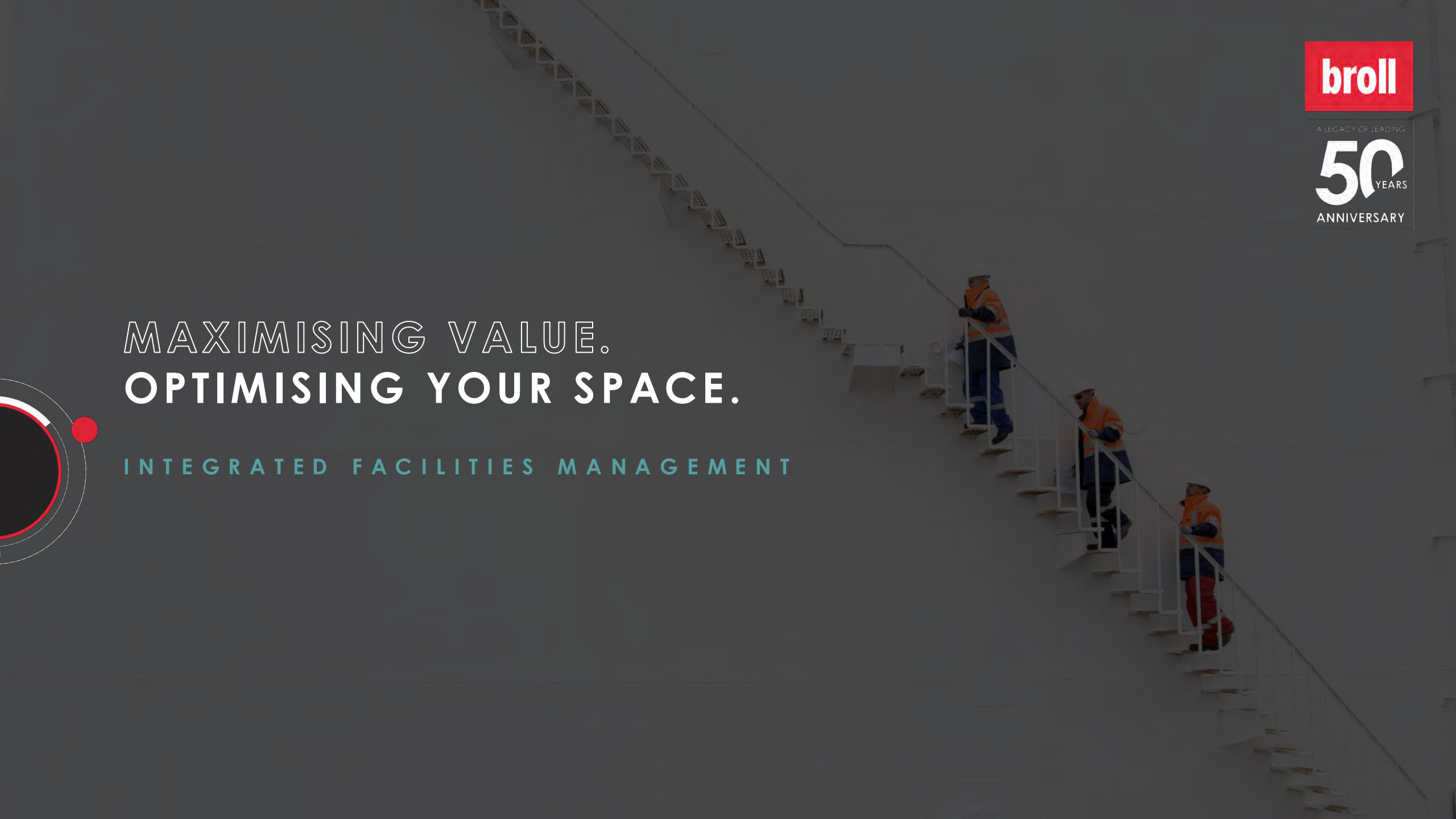
Trading Platform Offers

Private Treaty Sales
Live Auctions
Virtual Auctions
Online Bidding
Digital Tender Gateways
Virtual Data Rooms

Asset Classes

Offices
Retail Centres
Hotels
Industrial
Residential
Development land
Fuel Stations
Specialised Properties





MAXIMISING VALUE.
OPTIMISING YOUR SPACE.

INTEGRATED FACILITIES MANAGEMENT

OUR INTEGRATED FACILITIES MANAGEMENT CAPABILITIES

Evolving Real Estate into Future-Focused Facilities.

broll



17m m²
Under IFM Management

2004
Established

40,000+
Assets Under Full Life Cycle Management

2,300
Facilities/Sites Across Various Industries

8,200
Vendor/Supplier Relationships

16,000
ISO Accredited Digital Platform Sites Managed Remotely





10m m²
Hard/Technical Services Under Management

14m m²
Soft Services Under Management

6,500+
Residential Housing Units

Shift Operations From

80% reactive to 80% proactive





5m m²
World Heritage Site Management

6,000
Hygiene Units Under Management

90%
Locally sourced supplier development: Induction, training and development EME's and QSE's

50,000+
Service Calls Per Month



FULL-SUITE IFM SERVICES

one team | **one** contract
one integrated platform

SOFT SERVICES

Hygiene Services

Pest Control

Landscaping

Waste Management

Cleaning Service

TECHNOLOGY

Vantage Portal

b#

Computerised Automated Facility Management Engine (CAFME)

TECHNICAL SERVICES

HVAC Maintenance

Boiler Maintenance

Building & Infrastructure Maintenance

Building Management Systems

Diesel Bulk Storage

Electrical Supply & Reticulation

Fire Detection & Suppression Maintenance

Gas Supply

Access, Key & Lock Management

Lift & Hoist Maintenance

Parking Management

Indoor Air Quality Management

Refrigeration

Security & Access System

Utilities Management

Water Reticulation

PROFESSIONAL SERVICES

Occupational Health & Safety Consulting

Call Centre & 24/7 Help Desk

Statutory Compliance Audits

Asset Condition Audits & Total Lifecycle Management

Asset Tagging & Verification

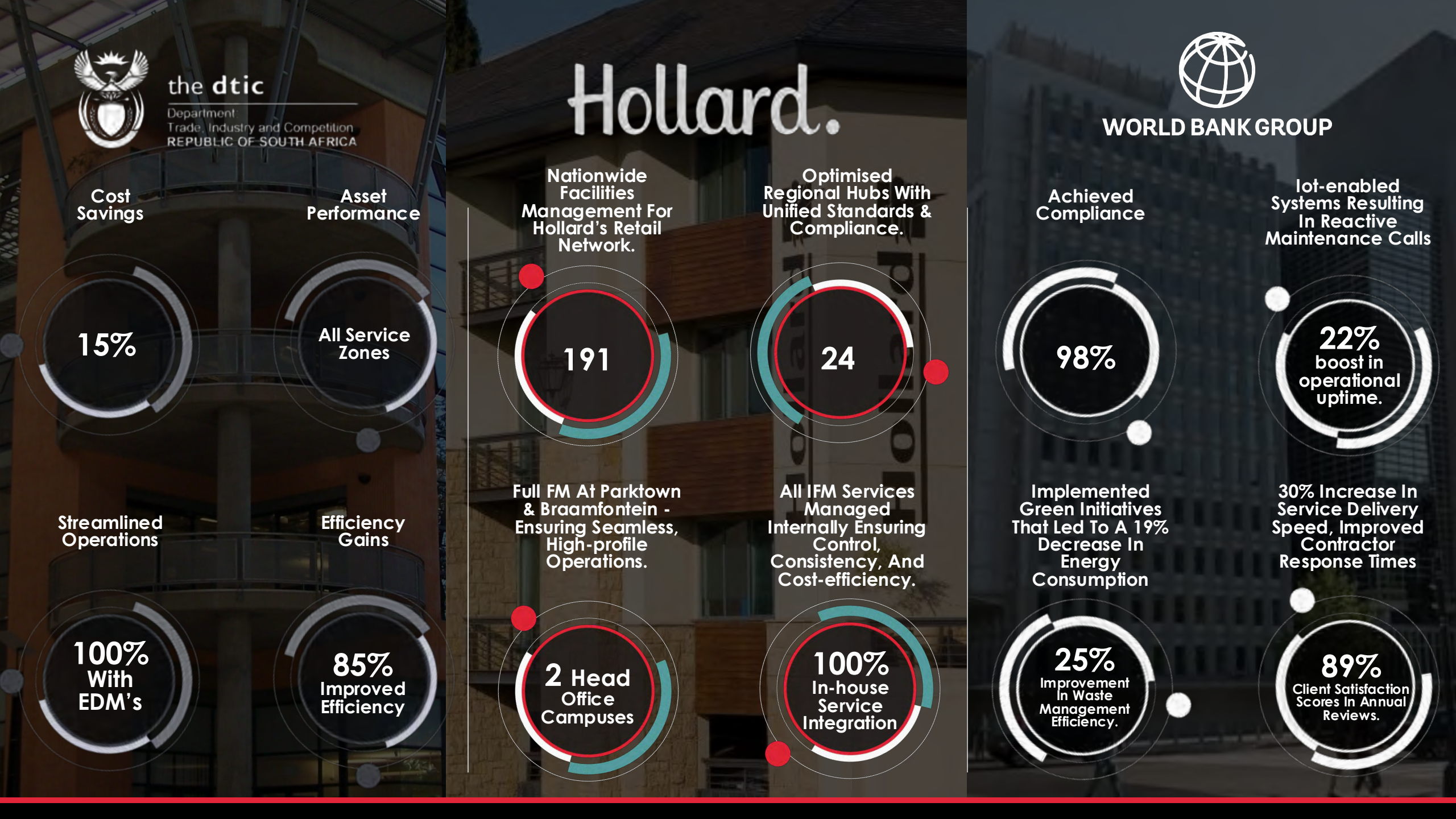
Environmental Management

Streamlined Supply Chain Management

Advisory Technology Solutions

Skills Development & Training

Supplier Development


the dtic
Department
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA
Cost Savings
15%
Asset Performance
All Service Zones
Streamlined Operations
100% With EDM's
Efficiency Gains
85% Improved Efficiency
Hollard.
Nationwide Facilities Management For Hollard's Retail Network.
191
Optimised Regional Hubs With Unified Standards & Compliance.
24
Full FM At Parktown & Braamfontein - Ensuring Seamless, High-profile Operations.
2 Head Office Campuses
All IFM Services Managed Internally Ensuring Control, Consistency, And Cost-efficiency.
100% In-house Service Integration
WORLD BANK GROUP
Achieved Compliance
98%
Iot-enabled Systems Resulting In Reactive Maintenance Calls
22% boost in operational uptime.
Implemented Green Initiatives That Led To A 19% Decrease In Energy Consumption
25% Improvement In Waste Management Efficiency.
30% Increase In Service Delivery Speed, Improved Contractor Response Times
89% Client Satisfaction Scores In Annual Reviews.

SECTOR SPECIFIC SPECIALISTS

We provide specialist services tailored to diverse sectors, offering customised solutions for a wide range of multi-geography businesses and clientele.

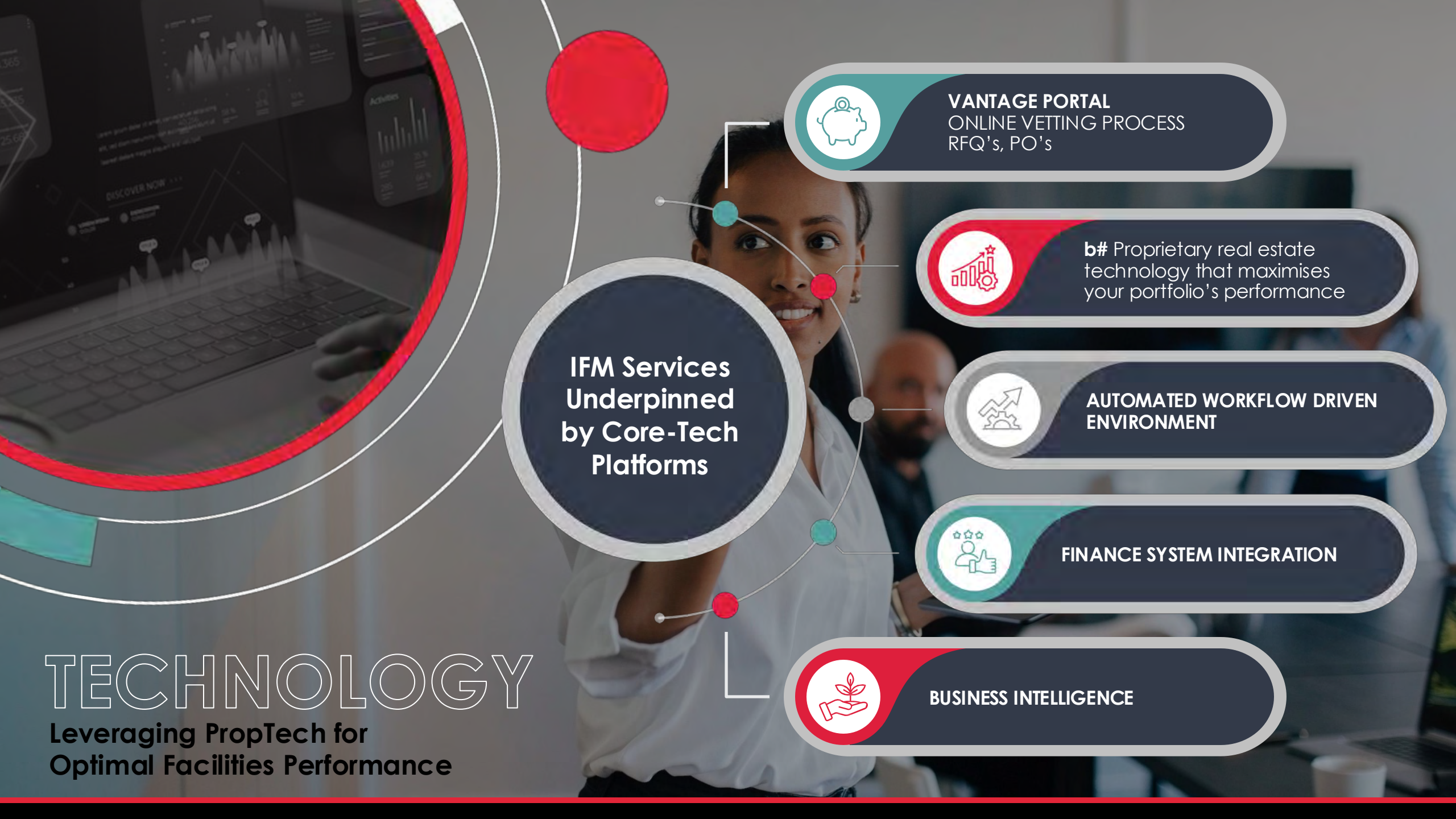
- LEADER IN CAPABILITY & EXPERTISE IN EMERGING MARKETS
- THRIVE IN DIVERSE & COMPLEX ENVIRONMENTS
- SKILLS ENABLER
- BLENDING TECHNOLOGY WITH A HUMAN TOUCH



broll

A LEGACY OF LEADING 50 YEARS ANNIVERSARY


broll
OPTIMISE &
STREAMLINE
your operations and cut costs by outsourcing non-core business activities to our facility management experts.
INTEGRATING WITH YOUR SYSTEMS, OUR TECH-DRIVEN SOLUTIONS CONSOLIDATE ALL PROFESSIONAL SERVICES UNDER ONE TEAM AND CONTRACT. THIS ALIGNMENT SAVES COSTS, ENHANCES YOUR ASSETS & BOOSTS PRODUCTIVITY.



TECHNOLOGY

Leveraging PropTech for Optimal Facilities Performance

IFM Services Underpinned by Core-Tech Platforms

VANTAGE PORTAL
ONLINE VETTING PROCESS
RFQ's, PO's

b# Proprietary real estate technology that maximises your portfolio's performance

AUTOMATED WORKFLOW DRIVEN ENVIRONMENT

FINANCE SYSTEM INTEGRATION

BUSINESS INTELLIGENCE

SMART, SUSTAINABLE

INTEGRATED SOLUTIONS FOR GREENER, MORE EFFICIENT FACILITIES.

Energy Management & Efficiency Audits (Including Iot-enabled Monitoring)

Water Conservation & Recycling Solutions

Waste Management & Recycling Programmes

Sustainability Consulting & Certifications (Green Star, LEED)

Labour & Human Rights Standards Compliance

Integrated Facilities Governance & Risk Management

ESG Reporting, Dashboards, & Benchmarking

Compliance With National Regulations (SANS 10400)

Occupational Health & Safety Standards, & International ESG Standards



U.S. GREEN BUILDING COUNCIL LEED USGBC

ICC INTERNATIONAL CODE COUNCIL®

IASE® INTERNATIONAL ASSOCIATION FOR SUSTAINABLE ECONOMY

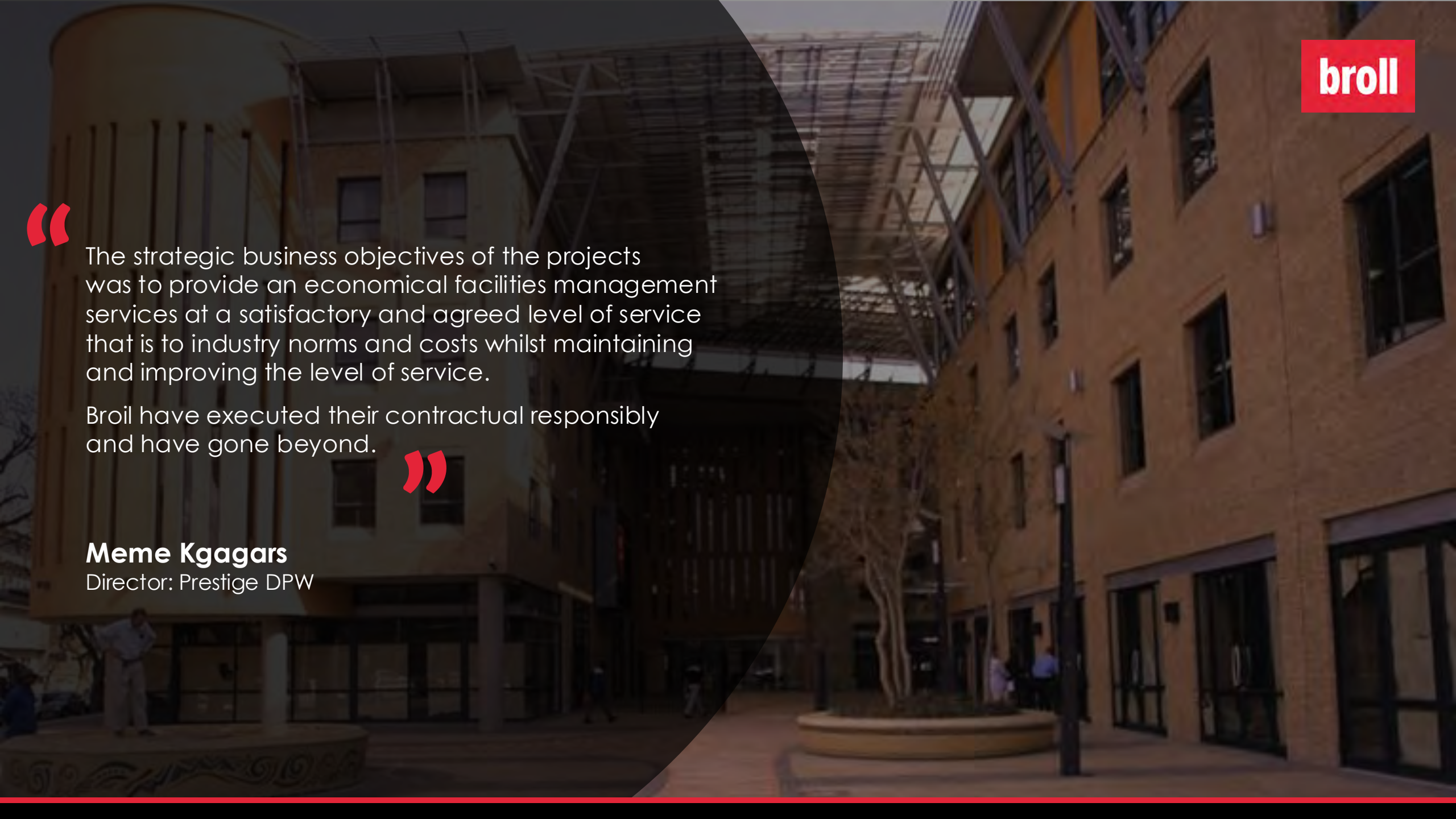
CODE FOR A SUSTAINABLE BUILT ENVIRONMENT BREEAM ES

broll

IFM REVOLUTIONISES OPERATIONS FROM

80% *reactive* to
80% **proactive planning.**



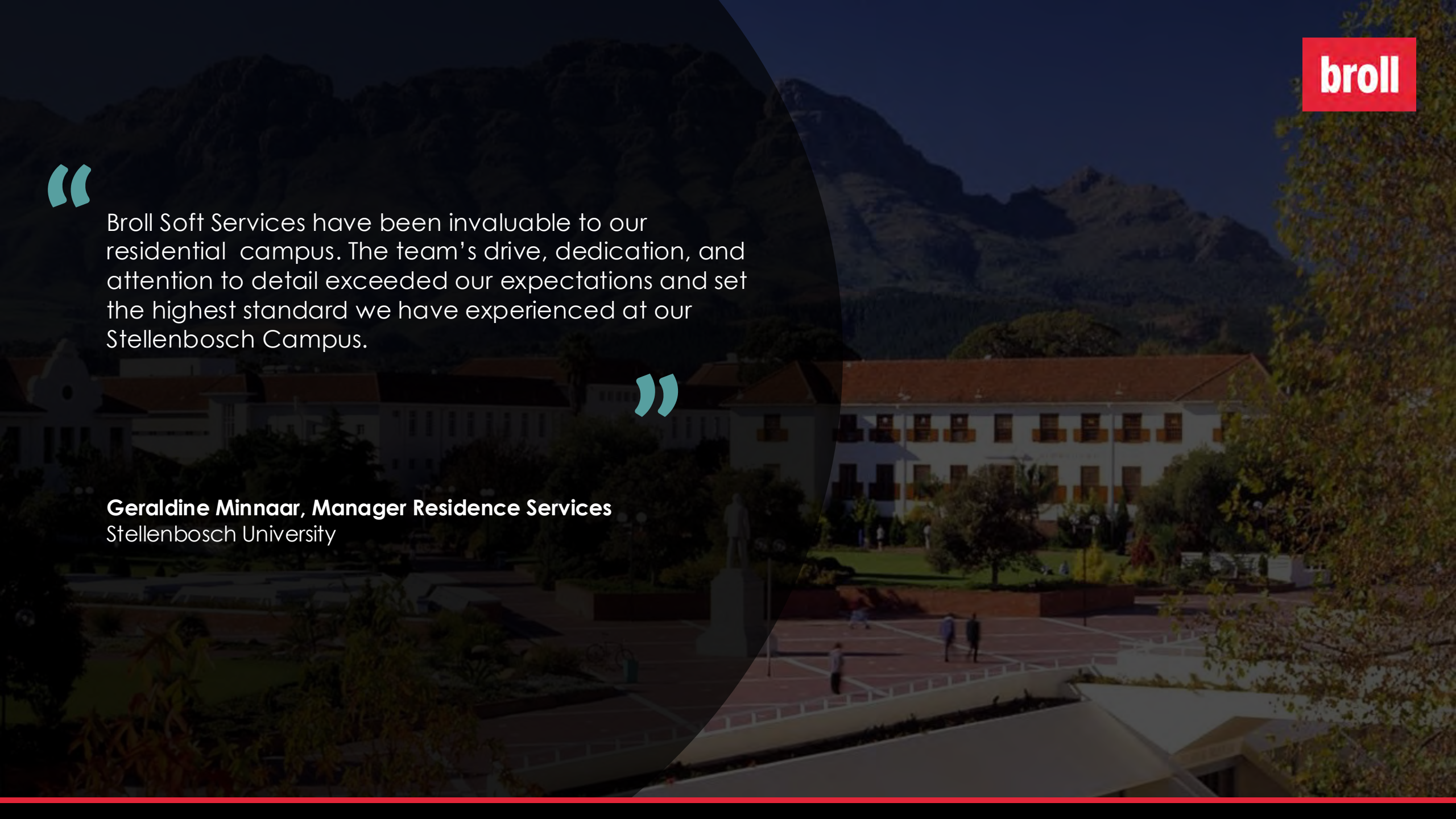


broll

"The strategic business objectives of the projects was to provide an economical facilities management services at a satisfactory and agreed level of service that is to industry norms and costs whilst maintaining and improving the level of service.

Broil have executed their contractual responsibly and have gone beyond."

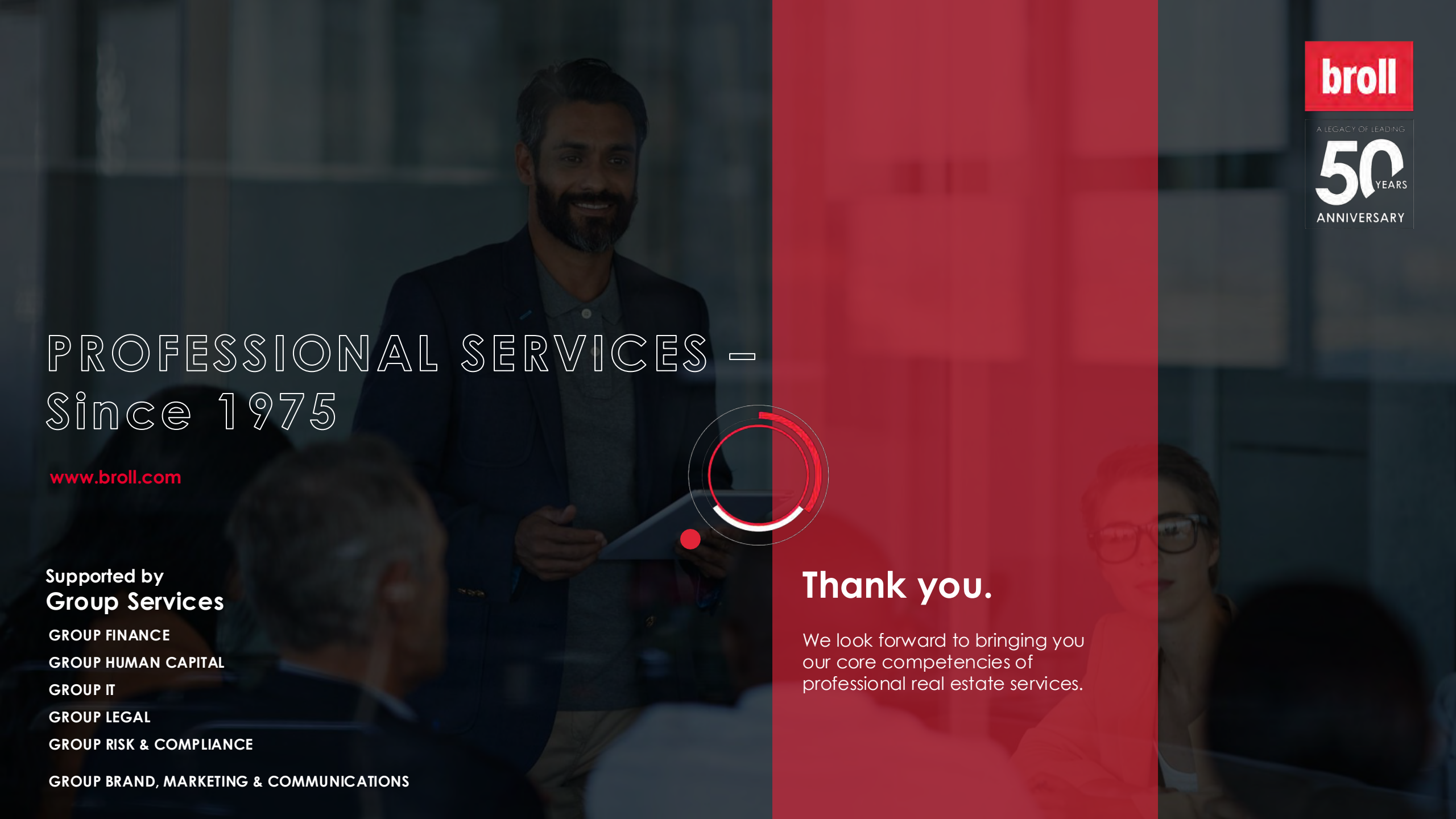
Meme Kgagars
Director: Prestige DPW



broll

“Broll Soft Services have been invaluable to our residential campus. The team’s drive, dedication, and attention to detail exceeded our expectations and set the highest standard we have experienced at our Stellenbosch Campus.”

Geraldine Minnaar, Manager Residence Services
Stellenbosch University



PROFESSIONAL SERVICES – Since 1975

www.broll.com

Supported by
Group Services

- GROUP FINANCE
- GROUP HUMAN CAPITAL
- GROUP IT
- GROUP LEGAL
- GROUP RISK & COMPLIANCE
- GROUP BRAND, MARKETING & COMMUNICATIONS

Thank you.

We look forward to bringing you our core competencies of professional real estate services.

broll

A LEGACY OF LEADING 50 YEARS ANNIVERSARY