Real Estate Investment Strategy

1 – 5 November 2027
Rome (Italy)



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Introduction

The Real Estate Investment Strategy course is designed to develop a practical and structured understanding of how to make stronger real estate investment decisions through market analysis, opportunity evaluation, risk assessment, financial review, and alignment with long-term organizational objectives.

Real estate investment is no longer limited to selecting a suitable asset or monitoring property price movements. It requires a strategic view that includes market cycles, location assessment, demand analysis, return expectations, risk exposure, financial planning, and comparison of investment alternatives before making decisions. This course helps participants build a clear methodology for evaluating real estate investments, whether related to existing assets, development projects, acquisition opportunities, or diversified property portfolios.

This one-week program follows a connected learning sequence. It begins with the fundamentals of real estate investment, then moves into market analysis and opportunity evaluation, followed by financial assessment and risk review. The course then covers portfolio management and investment strategy before concluding with the preparation of a practical real estate investment action plan. The content is aligned with the required course title Real Estate Investment Strategy.

Course Objectives

By the end of this course, participants will be able to:

- Understand the key concepts of real estate investment strategy.
- Analyze real estate markets from an investment and commercial perspective.
- Evaluate real estate opportunities based on location, demand, return, and risk.
- Differentiate between investment in existing assets and real estate development projects.
- Interpret key financial indicators related to real estate investment.
- Prepare preliminary assessments for real estate investment feasibility.
- Analyze market, financing, operational, and development-related risks.
- Compare investment alternatives to identify higher-value opportunities.
- Understand how to build a balanced real estate portfolio.
- Link real estate investment decisions with long-term organizational objectives.
- Develop a data-based approach to investment decision-making.
- Prepare a practical real estate investment strategy and implementation plan.



Course Outlines

Day 1: Introduction to Real Estate Investment Strategy

- Understanding real estate investment and its role in organizational growth.
- Identifying different types of real estate assets.
- Differentiating between direct and indirect real estate investment.
- Understanding the difference between real estate asset management and real estate investment.
- Analyzing the relationship between return, risk, and liquidity in real estate investment.
- Understanding the real estate market cycle and its impact on investment timing.
- Identifying factors that influence the attractiveness of real estate opportunities.
- Reviewing the foundations of real estate investment decision-making.
- Practical discussion on selecting suitable real estate opportunities.
- Practical exercise on defining initial investment objectives.

Day 2: Market Analysis and Real Estate Opportunity Evaluation

- Analyzing supply and demand in the real estate market.
- Assessing location and its impact on asset value and growth potential.
- Evaluating demographic and economic factors affecting the market.
- Analyzing competition and existing and planned projects.
- Reviewing rental trends, occupancy levels, prices, and demand growth.
- Identifying market gaps and underutilized opportunities.
- Evaluating the fit between a real estate opportunity and investment objectives.
- Using market data to support investment decisions.
- Practical activity on analyzing a selected real estate market.
- Preparing an initial opportunity attractiveness summary.

Day 3: Financial Evaluation and Investment Feasibility

- Understanding the core financial components of real estate investment.
- Analyzing expected income and operating costs.
- Calculating investment return and profitability indicators.
- Understanding cash flow and its role in evaluating opportunities.
- Analyzing the impact of financing and leverage on return and risk.
- Evaluating acquisition, development, or refurbishment costs.
- Preparing different financial scenarios for a real estate opportunity.
- Conducting sensitivity analysis for rent changes, costs, occupancy, and interest rates.
- Practical activity on a simplified real estate investment evaluation model.
- Reviewing feasibility results and linking them to the investment decision.



Day 4: Risk Management and Real Estate Portfolio Development

- Identifying key risks in real estate investment.
- Analyzing market, financing, operational, regulatory, and development risks.
- Evaluating risks related to location and asset type.
- Developing mitigation actions before and after investment.
- Understanding diversification within a real estate portfolio.
- Building a balanced portfolio across return, stability, and growth.
- Setting investment priorities based on financial and strategic objectives.
- Monitoring the performance of real estate assets within the portfolio.
- Preparing indicators to monitor return, occupancy, costs, and market value.
- Practical exercise on assessing the risk profile of a real estate portfolio.

Day 5: Real Estate Investment Strategy and Implementation Plan

- Turning real estate and financial analysis into a clear investment strategy.
- Defining criteria for selecting real estate opportunities.
- Building an investment decision-making framework.
- Ranking opportunities based on return, risk, priority, and strategic fit.
- Preparing an implementation plan for investment, development, or acquisition.
- Identifying stakeholders and follow-up responsibilities.
- Establishing a mechanism to review performance and update the strategy.
- Linking the investment plan with long-term expansion and growth.
- Final application on preparing an integrated real estate investment strategy.
- Presenting final recommendations and the proposed action plan.

Why Attend this Course: Wins & Losses!

- Build a practical understanding of real estate investment strategy.
- Improve the ability to analyze real estate markets before making decisions.
- Evaluate real estate opportunities in a more structured way.
- Link investment decisions with return, risk, and organizational objectives.
- Understand the difference between existing assets and development projects.
- Improve the ability to read financial and operational indicators.
- Prepare preliminary feasibility studies with greater accuracy.
- Analyze risks and develop appropriate mitigation actions.
- Build a more balanced real estate portfolio.
- Support acquisition, development, or exit decisions.
- Improve the quality of investment reports and recommendations.
- Prepare a practical and applicable real estate investment plan.



Conclusion

The Real Estate Investment Strategy course provides a practical framework for understanding real estate markets, evaluating investment opportunities, analyzing returns and risks, and building investment decisions that are more aligned with organizational objectives.

The program begins by explaining the fundamentals of real estate investment, asset types, and market cycles. It then moves into market analysis and opportunity evaluation through location, demand, competition, and pricing trends. After that, the course focuses on financial evaluation and feasibility assessment, including income, costs, cash flow, returns, and possible scenarios.

The program also covers risk management and real estate portfolio development before concluding with the preparation of an integrated real estate investment strategy and implementation plan. This sequence helps participants move from general market understanding to clear investment decisions supported by structured analysis.

By the end of the course, participants will be better prepared to evaluate real estate opportunities, prepare investment recommendations, manage risks, and build a real estate investment strategy that supports growth, sustainability, and long-term asset value improvement.

