

Real Estate Portfolio Dashboard

Professional storytelling through data-driven insights for portfolio optimization and strategic decision-making.



Portfolio at a Glance

3,000

Total Properties

Comprehensive portfolio
under active management

35%

Successfully Sold

Strong conversion rate
demonstrating market appeal

33%

Pending Deals

Active transactions
progressing through pipeline

32%

Listed for Sale

Fresh inventory ready for
market engagement

Our balanced portfolio distribution indicates steady buyer-seller engagement across all market segments, positioning us well for continued growth.

Key Performance Indicators

Core Business Metrics

Sold Properties

1,045 properties successfully closed

Formula: `CALCULATE(COUNTROWS,
Status = "sold")`

Active Listings

957 properties currently marketed

Formula:
`CALCULATE(Total_properties,
Status = "for sale")`

Pending Transactions

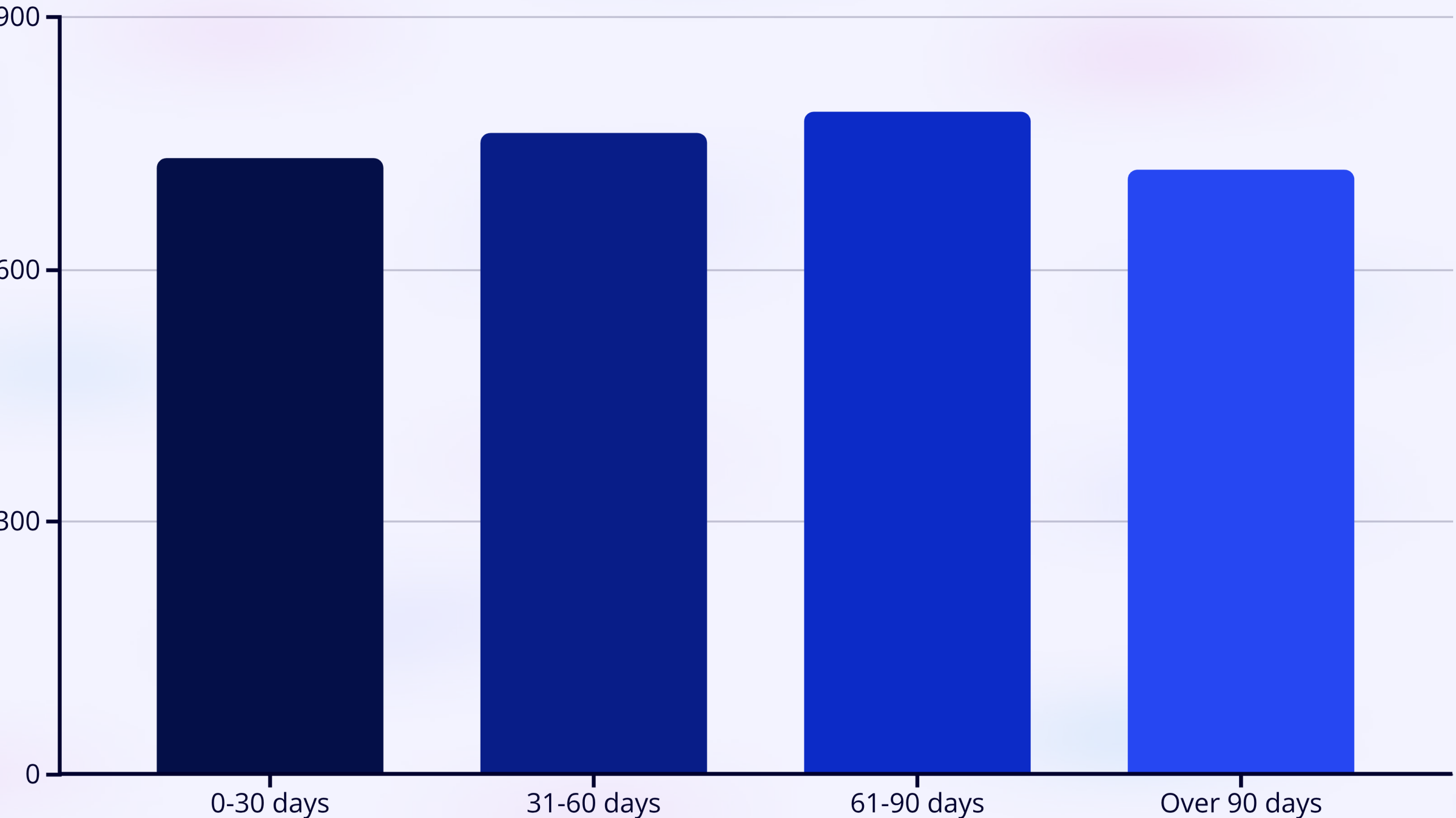
998 properties in negotiation

Significant capital tied up awaiting closure



DAX measures provide real-time visibility into portfolio performance and market dynamics.

Market Velocity Analysis



Geographic Distribution Leaders

California

Leading market with strong absorption rates in major metropolitan areas

Illinois

Balanced inventory across Chicago and suburban markets

New York

Premium market segments driving high-value transactions

Florida

Growth market with increasing buyer demand

Texas

Diverse portfolio across multiple growing cities

Market Performance Insights



Balanced Activity

Even distribution across sales funnel indicates healthy market dynamics with consistent buyer-seller engagement throughout the pipeline.



Capital Efficiency

35% conversion rate demonstrates strong market appeal, while pending transactions represent significant value awaiting closure.



Growth Opportunity

Geographic leaders show near-equal inventory distribution, presenting opportunities for targeted market expansion strategies.

Challenge Analysis

Pending Deal Bottlenecks

Negotiation and financing delays creating cash flow risks in high-value transactions

Stagnant Inventory

Properties over 90 days suggesting pricing misalignment or reduced market visibility

Regional Variance

Cities like Fresno and San Francisco showing different absorption patterns

Identifying bottlenecks early enables proactive intervention strategies to optimize portfolio performance.

➔ Bottleneck Identified: The large share of pending inventory is slowing overall portfolio turnover.

Strategic Recommendations

01

Reassess Stagnant Properties

Implement pricing adjustments and enhanced marketing strategies for properties exceeding 90 days on market

02

Accelerate Pending Closures

Streamline financing processes and eliminate bottlenecks on high-value pending transactions

03

Benchmark Performance

Apply 35% sold rate standard to underperforming segments and property categories

04

Optimize Property Mix

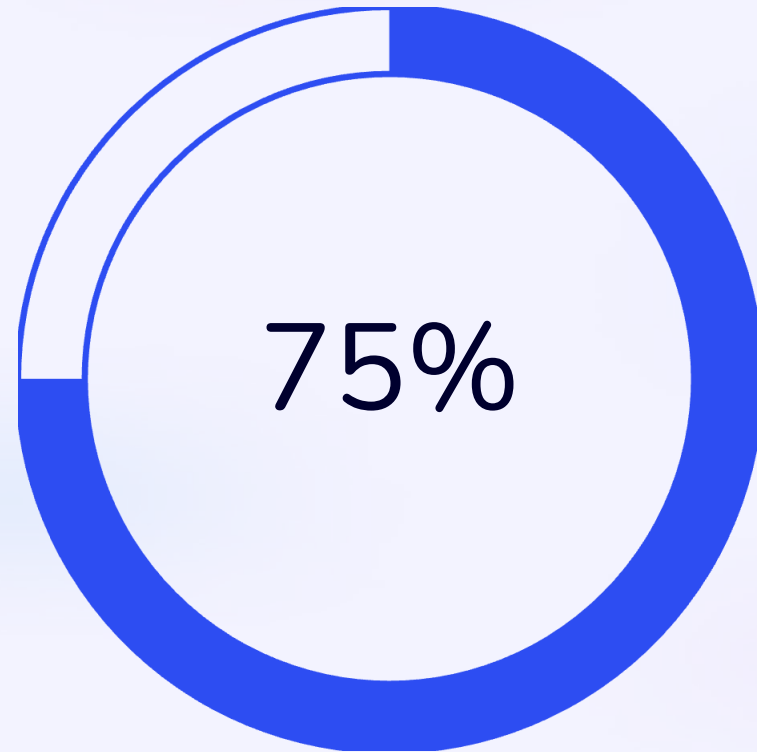
Focus on apartments and single-family homes showing faster movement patterns

05

Monitor Lead Indicators

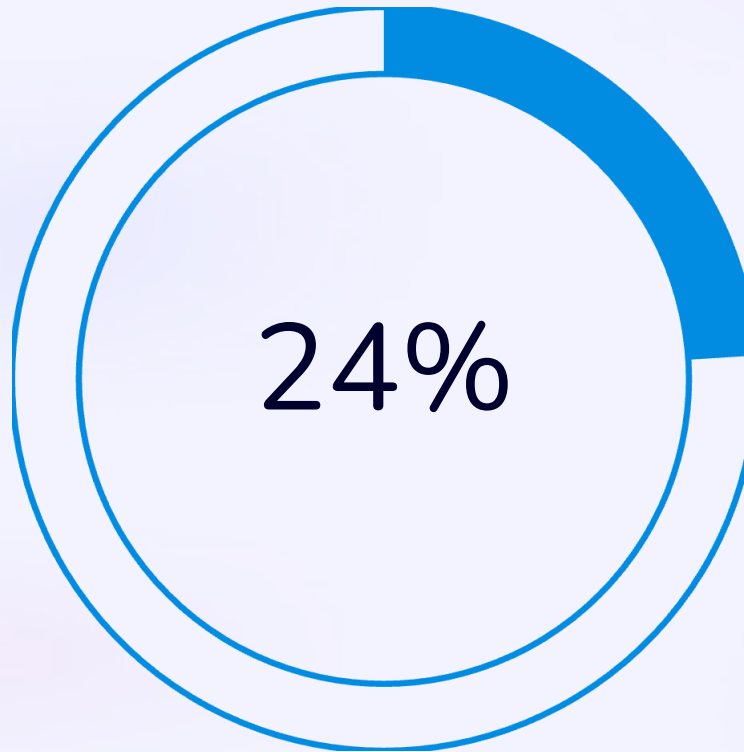
Track pending percentage, sales percentage, and days on market as early-warning metrics

Portfolio Health Assessment



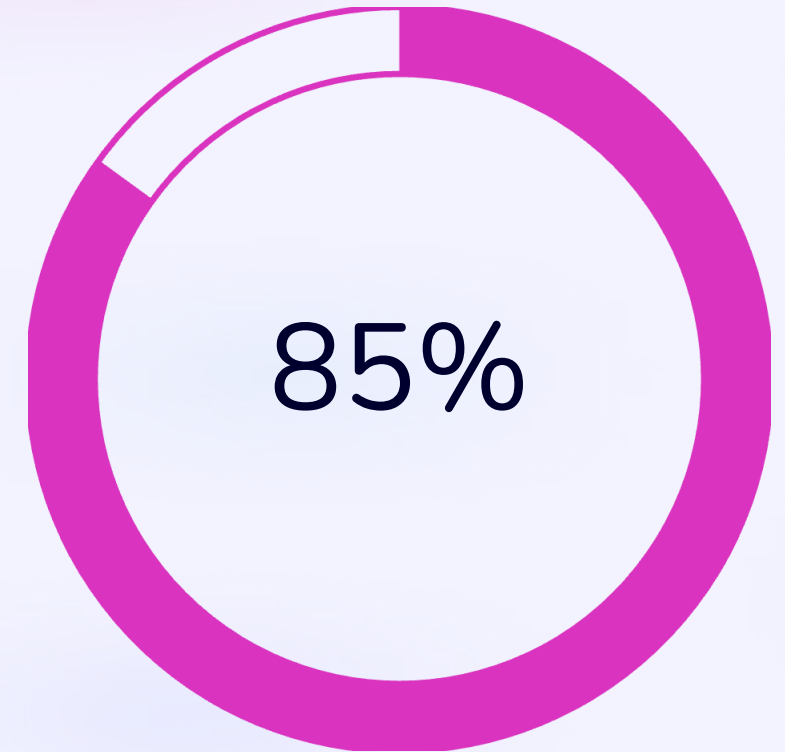
Market Activity Score

Strong balance between sold and active listings



At-Risk Inventory

Properties requiring immediate attention (>90 days)



Geographic Coverage

Well-distributed across top-performing markets

Overall portfolio demonstrates strong fundamentals with targeted opportunities for optimization in specific segments.

Next Steps Forward

1

Immediate Action

Address aging inventory and pending deal bottlenecks within 30 days

2

Strategic Optimization

Implement winning tactics from high-performing segments across entire portfolio

3

Continuous Monitoring

Establish dashboard tracking for proactive portfolio management and revenue optimization

Transform challenges into opportunities through data-driven decision making and strategic portfolio optimization for improved revenue flow and healthier inventory cycles.

