REITFactors.ai — Master Brief (Publication + Monetization) — Oct–Dec 2025

Team / Authors

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1) Purpose

A single, comprehensive record that combines the full context: the research paper and model, the website/platform, the monetization posture (public vs. gated), external interest (FTSE / Nareit), the webinar and REITworld timeline, and the publication objective as a strategic edge. This document is descriptive, not prescriptive.

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2) Snapshot — Where We Are (as of Oct 27, 2025)

- **Paper / Model**: We developed a **REIT-specific asset-pricing model**. It adapts traditional equity factor ideas to the REIT universe and **performs better** than generic equity factors for REITs (cross-sectional fit and performance).
- **Website / Platform**: **reitfactors.ai** is live with core pages and an **interactive dashboard**. The site will serve as the hub for factor definitions, analytics, and controlled data access (Fama-French–style library, tailored to REITs).
- **Business Direction**: This is **not** a public service. There will be a **limited public layer** for credibility and discovery, while the **core value is gated** (datasets, analytics, reports, advisory, index/benchmark alignment, and REIT-focused AI/RAG).
- **External Interest**: Parties from **FTSE** and **Nareit** have engaged with us. A **webinar** has been requested to walk through the paper, the website/dashboard, and the data/analytics. **Nareit** invited us to **REITworld 2025** (Dallas, **Dec 8–11, 2025**), providing **complimentary tickets** and warm **introductions**; the event is a key venue for meetings.

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3) Dual-Pillar Strategy (Combined)

A) Academic Validation (Publication Track) for out Paper Titled "REIT Factors"

- **Objective**: Secure publication in a top field journal to anchor credibility and create a durable edge.
- **Current Path**: Submission to **Real Estate Economics (REE)** in Fall 2025; if needed, consider a secondary outlet.
- **Outputs**: Peer-reviewed article, formal factor definitions, methodological appendix, and reproducibility references.
- **Role in Business**: Academic validation complements commercialization and strengthens institutional trust in the platform and data.

B) Commercial Monetization (Platform & Services)

- **Intent**: Translate the research into **revenue-producing offerings** with institutional polish.
- **Public vs. Gated**:
  - **Public** (limited): High-level summaries, selected demo views, and basic charts for credibility.
  - **Gated (commercial)**: Full factor library access, advanced analytics, reports/notes, advisory deliverables, and index/benchmark alignment; AI/RAG tools; export/API capabilities.

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4) Offering Stack (as discussed)

1. **REIT-Specific Factor Library**

   - Deliverables: Time series; documentation and methodology notes; versioned updates.
   - Access: Public overview; **gated** full series (download/API).

2. **Analytics & Dashboard**

   - Deliverables: Interactive analytics (performance/attribution, cross-sections, correlations), comparisons to generic equity factors.
   - Access: Public demo views; **gated** advanced views, exports, and saved workspaces.

3. **Reports & Notes**

   - Deliverables: Periodic updates on factor behavior and market context, aligned with library updates and events/webinars.
   - Access: **Subscriber** distribution; selected excerpts may be public.

4. **Advisory / Consulting**

   - Deliverables: Research briefings, benchmark/portfolio alignment, custom analytics and implementation support.
   - Access: **Engagement-based**; scoped SOWs.

5. **Index / Benchmark Alignment**

   - Deliverables: Rules-based index concept derived from the factor methodology, suitable for tracking (index/benchmark).
   - Access: **Commercial** via licensing/agreements.

6. **AI / Agentic RAG for REITs**

   - Deliverables: Retrieval-augmented tooling and agentic workflows over REIT corpora, factor docs, and structured datasets.
   - Access: **Gated** tools; enterprise access by arrangement.

7. **Centralized REIT Information Hub**

   - Deliverables: Consolidated reference pages and structured knowledge relevant to REITs (aligned with the platform's commercial posture).
   - Access: Mix of public overview and **gated** depth.

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5) Audiences & Use Cases (value capture frame)

- **Institutional Investors / Asset Managers**: Portfolio research, benchmarking, custom factor integration, and index alignment.
- **Sell-Side / Research Groups**: Notes/reports, webinars/teach-ins, and client education through a REIT-specific lens.
- **Academic / Policy (Selective)**: Read-only or delayed access that sustains credibility while protecting commercial value.

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6) Opportunities & Inbound Interest (current state)

- **Webinar (Requested)**: Walkthrough of the **paper** → **platform** → **dashboard** → **data/analytics**.
- **REITworld 2025 (Dallas, Dec 8–11)**: Attendance with facilitated introductions; **plan to reach out ahead of time to set meetings** and maximize time on-site.
- **Partnership Interest**: Exploratory FTSE contact; Nareit channel via **John Worth** (EVP, Research & Investor Outreach).

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7) Six-Week Orientation to REITworld (descriptive)

Window: Oct 27 – Dec 7, 2025
Event: REITworld 2025 · Dallas · **Dec 8–11, 2025** (Hilton Anatole)

- **Week −6 (Oct 27–Nov 2)**: Current status captured; webinar planning discussions ongoing (date **TBD**).
- **Week −5 (Nov 3–Nov 9)**: Site copy aligned with **public vs. gated** framing.
- **Week −4 (Nov 10–Nov 16)**: Demo views mirror manuscript highlights; factor library page reflects Fama-French–style access **with gating**.
- **Week −3 (Nov 17–Nov 23)**: Continue FTSE/Nareit coordination; **begin outreach for REITworld meetings**.
- **Week −2 (Nov 24–Nov 30)**: U.S. Thanksgiving week; light external activity; materials remain consistent and polished.
- **Week −1 (Dec 1–Dec 7)**: Finalize the materials to be shown in the webinar and at REITworld (paper visuals, dashboard flows, factor library snapshots).
- **Event Week (Dec 8–Dec 11)**: Dallas; warm introductions and scheduled meetings; on-site demonstrations at a high level.

> Orientation only; not a task list. Dates anchor around the conference window.

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8) Webinar — What Will Be Shown (as discussed)

- **Paper & Model**: Problem framing, factor construction concept, headline findings.
- **Platform Walkthrough**: Website structure, dashboard views, data/analytics enabled by the library.
- **Applications**: Research usage, portfolio analytics, and the **index/benchmark** concept at a high level.

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9) Assets & Materials (inventory)

- **Manuscript** — current draft (attached).

- **Website** — reitfactors.ai (public portal).
- **Dashboard** — interactive factor analytics.
- **Data** — factor series (planned downloads; eventual API).
- **Presentation Artifacts** — overview slides/demos aligned with the manuscript and site.
- **Brand / Positioning** — REITFactors.ai identity as the **REIT-specific factor** resource.

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10) Messaging Snapshots (for intros/emails)

- **One-Line**: **REITFactors.ai** combines **top-journal academic validation** with a **commercial REIT factor platform** — gated datasets, advanced analytics, advisory, and index alignment, built by PhD-level experts with institutional focus.
- **Elevator (Short)**: We built **REIT-specific asset-pricing factors** that outperform generic equity factors for REITs and turned them into a **commercial platform**. A limited public layer shows credibility; the **gated core** includes the factor library, analytics, notes, advisory, index alignment, AI/RAG, and data/API access. Publication (REE path) strengthens the edge.

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11) Reference & Contacts

- **Website**: reitfactors.ai
- **Dashboard**: reitfactors.ai/dashboard
- **Research Page**: reitfactors.ai/research
- **Event**: REITworld 2025 (Dallas, Dec 8–11)
- **External Stakeholders**:
  - **Nareit** — **John Worth**, EVP Research & Investor Outreach
  - **FTSE / FTSE Russell** — exploratory contact

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12) Appendix — Copy/Paste Block (Team)

- Mariya Letdin — Florida State University
- Cayman Seagraves — University of Tulsa, Collins College of Business
- Stace Sirmans — Auburn University, Department of Finance