INVESTORIQ

INSTITUTIONAL-GRADE INTELLIGENCE FOR REAL ESTATE INVESTORS

INVESTORIQ
BLACKSTONE-QUALITY ANALYSIS & REPORTING

SAMPLE INVESTMENT REPORT

HARBORVIEW RESIDENCES

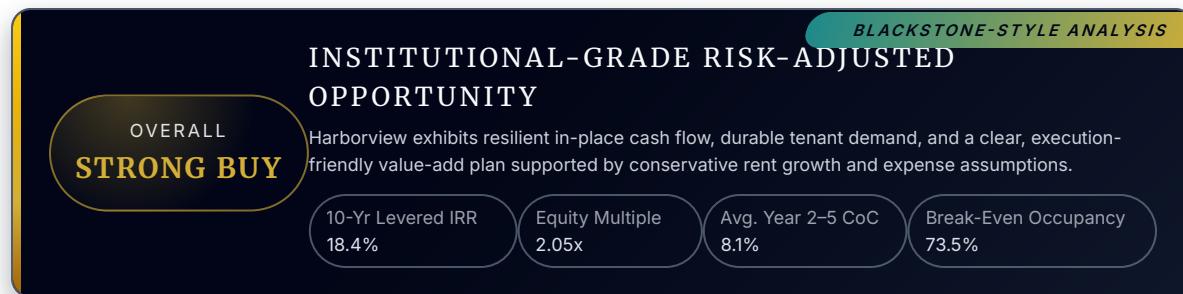123 HARBORVIEW DRIVE, TAMPA, FL · 72-UNIT MULTIFAMILY ASSET

PREPARED FOR   PREPARED BY   REPORT DATE

Sample Investor & PartnersInvestorIQ Institutional AnalystNovember 2025 (Sample)

SAMPLE REPORT — FOR DEMONSTRATION PURPOSES ONLY

INVESTMENT VERDICT   Scenario: Base Case · 10-Year Hold · Light Value-Add

BLACKSTONE-STYLE ANALYSIS

INSTITUTIONAL-GRADE RISK-ADJUSTED OPPORTUNITY

OVERALL
STRONG BUY

Harborview exhibits resilient in-place cash flow, durable tenant demand, and a clear, execution-friendly value-add plan supported by conservative rent growth and expense assumptions.

| 10-Yr Levered IRR 18.4% | Equity Multiple 2.05x | Avg. Year 2–5 CoC 8.1% | Break-Even Occupancy 73.5% |

KEY UNDERWRITING METRICS

METRIC	BASE CASE	STRESS CASE
PURCHASE PRICE	$15,800,000	$15,800,000
GOING-IN CAP RATE	5.10%	5.10%
STABILIZED CAP RATE	6.15%	5.90%
10-YR LEVERED IRR	18.4%	14.7%
EQUITY MULTIPLE	2.05x	1.68x
AVG. COC YEARS 2–5	8.1%	6.2%
BREAK-EVEN OCCUPANCY	73.5%	78.2%

EXECUTIVE COMMENTARY

InvestorIQ's institutional underwriting indicates a resilient cash-flow profile supported by diversified tenancy, below-market rents, and structural supply constraints in the submarket. The value-add scope is execution-friendly (interior upgrades, amenity refresh, light exterior work) and is not dependent on aggressive rent growth assumptions.

The business plan targets a modest repositioning rather than a full-scale redevelopment, preserving downside protection while delivering an attractive risk-adjusted return profile.

InvestorIQ · Institutional-Grade Real Estate Intelligence   Sample Report · Harborview Residences

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SCENARIO ANALYSIS & CHARTS   InvestorIQ Sample Output

RETURN PROFILE & CASH FLOW DYNAMICS

The following charts are generated directly from the InvestorIQ engine and exported to static PNG assets prior to PDF creation. This architecture ensures DocRaptor compatibility (no in-line JavaScript) while preserving institutional-quality visualization.
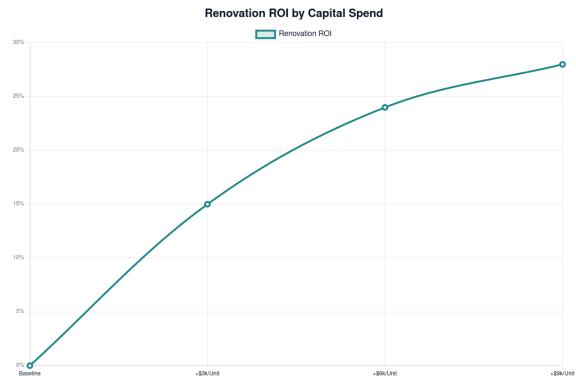
IRR BY SCENARIO

Base, Conservative, and Upside IRR outcomes across a 10-year hold with consistent capital structure.
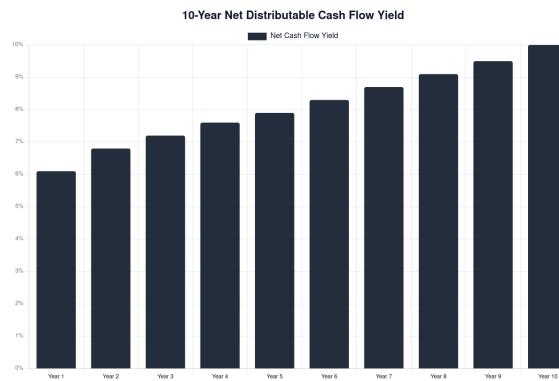

RENOVATION ROI

Projected ROI by renovation scope, highlighting marginal returns above baseline capital spend.

10-YEAR CASH FLOW PROFILE

Net distributable cash flow after debt service, before promote, illustrating the stability of the income stream.

BREAK-EVEN OCCUPANCY

Sensitivity of break-even occupancy levels under different expense and leverage assumptions.

InvestorIQ · Proprietary Analysis Engine   Charts & Scenario Analysis