Malaysia Property Market Outlook
Mid Year Review and The Southern Shift of The Property Centre of Gravity

REI Group of Companies
Presentation by Dr. Daniele Gambero

Connecting the ...... dots between economy, demographic trends and new housing concepts
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CONSULTANCY
- Strategic Marketing
- Property Market Surveys
- Property Market Reporting
- Property Market Analysis
- Branding
- Creative

Gambero Property Market Intelligence (Gambero PMI)
- access updated information & data on both Regional & Local economic indicators
- latest information on future market trends in property development
- insights on developers information, new forthcoming hotspots and proposed infrastructures

Strategic Marketing & Property Analyst
"The ability to convert ideas in facts is the secret to outward success"

Gambero Property Market Intelligence Program
Connecting the Dots Between Global Economy and Property Investment Decisions
Organizations that have invited Dr. Daniele Gambero as speaker to their events are:
Rehda KL, Rehda JB, Rehda Malacca and Rehda Penang
Sheda Kuching
Asian Strategic Leadership Institute (ASLI)
FIABCI Malaysian Chapter
iProperty, PropertyGuru Malaysia and Singapore and EG Expos
Malaysian Property Incorporated
University Malaya KL
Wealth Mastery Academy, Comfori and Starfish

Special Property Market Outlook presentation to the Bod of:
Encorp Bhd
Hatten Group
UEM Sunrise
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Regular columnist for several newspapers and specialized magazine such as:

- The Star
- Malaysian Reserve
- Malay Mail
- The Sun
- PropertyTimes
- Real Estate Malaysia
- Property Hunter
- Property Insight
- Property King
Regular columnist for several newspapers and specialized magazine such as:
Best Project Marketing Company
REI Group of Companies
Agenda

Malaysian Economic Performance: room for improvement
Malaysian Economy: Fact File
Malaysian Demographic and Wealth: the way forward
Malaysian Real Estate: Strategically Sustainable
Malaysian Real Estate: what and where
Malaysian Real Estate: when and why
MALAYSIAN PROPERTY MARKET
Setting the rules for sustainability

HEALTHY GROWTH OF A REGULATED AND PROFITABLE PROPERTY MARKET

DEFINITION AND DEVELOPMENT OF ECONOMIC CLUSTERS
DEFINITION AND DEVELOPMENT OF PROPER INFRASTRUCTURE
SOCIO/ECONOMIC EQUITY OR FAIR WEALTH DISTRIBUTION AND INSTITUTIONAL FRAMEWORK & REGULATORY AUTHORITY

ECONOMIC GROWTH PLANNING AND EXECUTION
STABLE AND DEMOCRATIC POLITICAL ENVIRONMENT

www.reigroup.com.my
<table>
<thead>
<tr>
<th></th>
<th>USA</th>
<th>EU</th>
<th>UK</th>
<th>JAPAN</th>
<th>AUSTRALIA</th>
<th>MALAYSIA</th>
</tr>
</thead>
<tbody>
<tr>
<td>GDP Growth</td>
<td>2.52%</td>
<td>0.12%</td>
<td>0.65%</td>
<td>0.65%</td>
<td>0.65%</td>
<td>4.70%</td>
</tr>
<tr>
<td>Gov. Debt as % of GDP</td>
<td>101.60%</td>
<td>90.60%</td>
<td>91.10%</td>
<td>226.1%</td>
<td>20.7%</td>
<td>53.10%</td>
</tr>
<tr>
<td>Gov. Deficit as % of GDP</td>
<td>-4.10%</td>
<td>-3.7%</td>
<td>-7.40%</td>
<td>-9.6%</td>
<td>-3.00%</td>
<td>-4.50%</td>
</tr>
<tr>
<td>Balance of Current Acc in USD Billion</td>
<td>-360.7</td>
<td>-34.5</td>
<td>-93.6</td>
<td>56.6</td>
<td>-44.9%</td>
<td>16.6</td>
</tr>
<tr>
<td>Inflation</td>
<td>1.5%</td>
<td>1.5%</td>
<td>2.7%</td>
<td>0.2%</td>
<td>2.4%</td>
<td>3.2%</td>
</tr>
<tr>
<td>Unemployment</td>
<td>7.3%</td>
<td>10.8%</td>
<td>7.7%</td>
<td>4.1%</td>
<td>5.7%</td>
<td>3%</td>
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## GLOBAL & MALAYSIAN ECONOMY - FACT FILE

<table>
<thead>
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<th>Category</th>
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<th>MALAYSIA</th>
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</thead>
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<tr>
<td>GDP Growth</td>
<td>6.20%</td>
<td>4.70%</td>
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<tr>
<td>Gov. Debt as % of GDP</td>
<td>65.2%</td>
<td>53.10%</td>
</tr>
<tr>
<td>Redefined</td>
<td>-4.10%</td>
<td>-4.50%</td>
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<tr>
<td>Gov. Deficit as % of GDP</td>
<td>-4.10%</td>
<td>-4.50%</td>
</tr>
<tr>
<td>Balance of Current Acc in USD Billion</td>
<td>26.4</td>
<td>16.6</td>
</tr>
<tr>
<td>Inflation</td>
<td>3.40%</td>
<td>3.2%</td>
</tr>
<tr>
<td>Unemployment</td>
<td>2.80%</td>
<td>3%</td>
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</tbody>
</table>
MALAYSIAN DEMOGRAPHIC - FACT FILE UPDATE 2012

- +1.6 M
- +3.6 M
- +1.6 M
- +2.6 M
- +6 M

Bar chart showing population growth from 1990 to 2050 for different age groups: 0-19, 20-49, and 50 and above.
2012: 72.5% of the Malaysian population lives in urban areas
2012: 21,000,000 Malaysians live in urban areas 3.5% growth every year
FEW CONSIDERATION ON MALAYSIANS WEALTH:

Malaysian average per capita income 2013 (PPP) – Source IMF/WB

USD17,046 per year = RM4,400 (per month)

Malaysian Wealth Distribution

Lowest 20% Share 5% of Malaysian wealth

Highest 20% Share 40% of Malaysian wealth

Median 60% share 55%

18,000,000
MALAYSIAN WEALTH DISTRIBUTION - FACT FILE
FEW CONSIDERATION ON MALAYSIANS WEALTH:

<table>
<thead>
<tr>
<th>State</th>
<th>State by state (est) Population in 2012</th>
<th>GDP 2012 per Capita at current prices</th>
<th>35% of monthly income = Loan repayment</th>
<th>Affordable House value (30 yrs loan @ BLR-2.3 4.4%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Yearly RM</td>
<td>Monthly RM</td>
<td>Per capita RM</td>
</tr>
<tr>
<td>Kuala Lumpur</td>
<td>1,718,680</td>
<td>73,931</td>
<td>6,161</td>
<td>2,156.32</td>
</tr>
<tr>
<td>Pulau Pinang</td>
<td>1,654,640</td>
<td>37,006</td>
<td>3,084</td>
<td>1,079.34</td>
</tr>
<tr>
<td>Selangor</td>
<td>5,626,240</td>
<td>36,135</td>
<td>3,011</td>
<td>1,053.94</td>
</tr>
<tr>
<td>Malacca</td>
<td>832,320</td>
<td>33,550</td>
<td>2,796</td>
<td>978.54</td>
</tr>
<tr>
<td>Negeri Sembilan</td>
<td>1,040,400</td>
<td>32,511</td>
<td>2,709</td>
<td>948.24</td>
</tr>
<tr>
<td>Johor</td>
<td>3,337,360</td>
<td>24,574</td>
<td>2,048</td>
<td>716.74</td>
</tr>
<tr>
<td>Sabah</td>
<td>3,437,360</td>
<td>19,010</td>
<td>1,584</td>
<td>554.46</td>
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</table>
### MALAYSIAN WEALTH DISTRIBUTION - FACT FILE

FEW CONSIDERATION ON MALAYSIANS WEALTH:

<table>
<thead>
<tr>
<th>AREA</th>
<th>GDP per Capita at current prices</th>
<th>2012 % on Malaysia Population</th>
<th>Population in 2012</th>
<th>GDP at constant prices (RM Mil)</th>
<th>2012 % on Malaysia GDP</th>
<th>GDP YoY growth</th>
</tr>
</thead>
</table>
MALAYSIAN WEALTH DISTRIBUTION - FACT FILE

FEW CONSIDERATION ON AFFORDABLE HOUSING

- 20% of Houses as low/medium cost
- 60% of Houses should have values from minimum RM200 up to max RM700 psf
- 20% of Houses free and open value RM/psf

Malaysian Wealth Distribution

Lowest 20%
Share 5% of Malaysian wealth

Highest 20%
Share 40% of Malaysian wealth

Median 60% share 55%

18,000,000
80.7% of the Malaysian Household debt is financed by the Banking System
80.7% of the Malaysian Household debt is financed by the Banking System.

Household NPL ratios, as per BN and MBB reports, have been falling dramatically over the past few years from 7.5% in 2006 to just 1.4% mid 2013.

Source: Bank Negara and Maybank Research
How House Price Index and Per Capita income index are strictly correlated, what is this comparison showing?

Median income +175%

House price index +67%
MALAYSIAN PROPERTY MARKET SUSTAINABILITY

How House Price Index and Per Capita income index are strictly correlated, what is this comparison showing?

Source: NAPIC - CIMB
MALAYSIAN PROPERTY MARKET SUSTAINABILITY

DEMAND AND SUPPLY: MATCHING OR MISMATCHING?

TOTAL VALUE OF PROPERTY TRANSACTION 2013

Source: Napic Property Market Report 2013

<table>
<thead>
<tr>
<th>Code</th>
<th>Type</th>
<th>Value RM Millions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residential</td>
<td>72,060</td>
<td></td>
</tr>
<tr>
<td>Agricultural</td>
<td>13,283</td>
<td></td>
</tr>
<tr>
<td>Commercial</td>
<td>35,561</td>
<td></td>
</tr>
<tr>
<td>Industrial</td>
<td>12,328</td>
<td></td>
</tr>
<tr>
<td>Developments &amp; Others</td>
<td>19,137</td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>152,369</td>
<td></td>
</tr>
</tbody>
</table>

Source: NAPIC
MALAYSIAN PROPERTY MARKET SUSTAINABILITY
DEMAND AND SUPPLY: MATCHING OR MISMATCHING?

NUMBER OF PROPERTIES TRANSACTED
PERCENTAGE OF CHANGE 2003 2013

% PERCENTAGE OF CHANGE
-35 -30 -25 -20 -15 -10 -5 0 5 10 15 20 25 30 35

-9.7 -12.4 -15.7 -16.5
Residential
Industrial
Agricultural
Commercial

Source: NAPIC

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HOUSE PRICE APPRECIATION 2013 by STATE

SOURCES: CIMB, PMR
Average transaction value by property type (RM) 2001 - 2013

Source: NAPIC - CIMB
HOUSING EXISTING STOCK AND FUTURE SUPPLY

RESIDENTIAL: COMPLETIONS, STARTS AND NEW PLANNED SUPPLY 2009 - 2013 (Units)

Source: Napic Property Market Report 2013
### HOUSING EXISTING STOCK AND FUTURE SUPPLY ESTIMATE

<table>
<thead>
<tr>
<th>Kuala Lumpur and Selangor</th>
<th>Single, 2, 3 Storey Terrace</th>
<th>Single, 2, 3 Storey Semi-D</th>
<th>Bungalows and Cluster</th>
<th>Low Cost House and Flat</th>
<th>Condominium Service App and Soho</th>
<th>Grand Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing stock 2012</td>
<td>650,038</td>
<td>47,133</td>
<td>83,832</td>
<td>585,549</td>
<td>382,984</td>
<td>1,749,536</td>
</tr>
<tr>
<td>Completions by 2015</td>
<td>7,271</td>
<td>2,009</td>
<td>1,498</td>
<td>2,753</td>
<td>9,342</td>
<td>22,873</td>
</tr>
<tr>
<td>Incoming supply by 2015</td>
<td>44,731</td>
<td>13,753</td>
<td>11,238</td>
<td>19,714</td>
<td>94,420</td>
<td>183,856</td>
</tr>
<tr>
<td>Starts by 2020</td>
<td>12,183</td>
<td>3,496</td>
<td>3,549</td>
<td>1,607</td>
<td>32,801</td>
<td>53,636</td>
</tr>
<tr>
<td>Planned supply by 2020</td>
<td>30,224</td>
<td>7,457</td>
<td>13,108</td>
<td>37,518</td>
<td>54,965</td>
<td>143,272</td>
</tr>
<tr>
<td>New planned supply by 2020</td>
<td>8,862</td>
<td>2,802</td>
<td>2,976</td>
<td>1,358</td>
<td>29,936</td>
<td>45,934</td>
</tr>
<tr>
<td><strong>TOTAL PER TYPE BY 2020</strong></td>
<td><strong>946,160</strong></td>
<td><strong>648,499</strong></td>
<td><strong>604,448</strong></td>
<td><strong>2,199,107</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Greater KL will reach 10 million people (Mega City) by 2020
Singapore aspires to have 6.9 million by 2030
Iskandar Malaysia aim to have 3 million by 2025
## HOUSING: CURRENT AND FUTURE DEMAND ESTIMATE IN KUALA LUMPUR/KLANG VALLEY

<table>
<thead>
<tr>
<th>ESTIMATE DEMAND-OFFER TREND FOR KUALA LUMPUR AND SELANGOR</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL KUALA LUMPUR AND SELANGOR POPULATION AS AT 2012</td>
<td>7,594,000</td>
</tr>
<tr>
<td>CURRENT DEMAND OF HOMES (3 members per household)</td>
<td>2,531,333</td>
</tr>
<tr>
<td>AVAILABLE STOCK AS AT 2012</td>
<td>1,749,536</td>
</tr>
<tr>
<td>CURRENT NEED OF HOUSES as at 2012</td>
<td>781,797</td>
</tr>
<tr>
<td>TOTAL KUALA LUMPUR AND SELANGOR POPULATION AS AT 2015</td>
<td>8,058,814</td>
</tr>
<tr>
<td>DEMAND OF HOMES BY 2015 (3 members per household)</td>
<td>2,686,271</td>
</tr>
<tr>
<td>INCOMING SUPPLY BY 2015</td>
<td>1,956,265</td>
</tr>
<tr>
<td>ESTIMATE NEED OF HOUSES BY 2015</td>
<td>730,006</td>
</tr>
<tr>
<td>TOTAL KUALA LUMPUR AND SELANGOR POPULATION AS AT 2020</td>
<td>8,897,581</td>
</tr>
<tr>
<td>DEMAND OF HOMES BY 2020 (3 members per household)</td>
<td>2,965,860</td>
</tr>
<tr>
<td>INCOMING SUPPLY BY 2020</td>
<td>2,199,107</td>
</tr>
<tr>
<td>ESTIMATE NEED OF HOUSES BY 2020</td>
<td>766,753</td>
</tr>
</tbody>
</table>
### Average price of property per country 2012 - SEA REGION

#### Property value to income per capita (PPP) ratio

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<thead>
<tr>
<th>Ranking</th>
<th>Country</th>
<th>RM/psf</th>
<th>House of 1,000 Sq.Ft.</th>
<th>GDP Per capita (PPP) USD</th>
<th>GDP Per capita (PPP) RM</th>
<th>Property value to income ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Hong Kong</td>
<td>3,124.59</td>
<td>3,124,590.30</td>
<td>44,770</td>
<td>143,264</td>
<td>21.81</td>
</tr>
<tr>
<td>2</td>
<td>Singapore</td>
<td>2,684.31</td>
<td>2,684,310.67</td>
<td>53,266</td>
<td>170,451</td>
<td>15.75</td>
</tr>
<tr>
<td>3</td>
<td>Australia</td>
<td>1,345.25</td>
<td>1,345,254.55</td>
<td>35,668</td>
<td>114,138</td>
<td>11.79</td>
</tr>
<tr>
<td>4</td>
<td>Japan</td>
<td>1,266.79</td>
<td>1,266,794.87</td>
<td>31,425</td>
<td>100,560</td>
<td>12.60</td>
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<tr>
<td>5</td>
<td>South Korea</td>
<td>950.93</td>
<td>950,925.31</td>
<td>27,990</td>
<td>89,568</td>
<td>10.62</td>
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<tr>
<td>6</td>
<td>Taiwan</td>
<td>911.38</td>
<td>911,379.60</td>
<td>33,608</td>
<td>107,546</td>
<td>8.47</td>
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<td>7</td>
<td>Brunei</td>
<td>847.36</td>
<td>847,359.72</td>
<td>45,978</td>
<td>147,130</td>
<td>5.76</td>
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<tr>
<td>8</td>
<td>China</td>
<td>794.82</td>
<td>794,817.91</td>
<td>7,957</td>
<td>25,462</td>
<td>31.22</td>
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<tr>
<td>9</td>
<td>Thailand</td>
<td>451.83</td>
<td>451,829.25</td>
<td>8,458</td>
<td>27,066</td>
<td>16.69</td>
</tr>
<tr>
<td>10</td>
<td>Myanmar</td>
<td>414.39</td>
<td>414,385.92</td>
<td>1,324</td>
<td>4,237</td>
<td>97.81</td>
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<tr>
<td>11</td>
<td>Malaysia</td>
<td>367.42</td>
<td>367,418.25</td>
<td>17,046</td>
<td>54,546</td>
<td>6.74</td>
</tr>
<tr>
<td>12</td>
<td>Philippines</td>
<td>285.84</td>
<td>285,838.91</td>
<td>3,802</td>
<td>12,166</td>
<td>23.49</td>
</tr>
<tr>
<td>13</td>
<td>Vietnam</td>
<td>241.09</td>
<td>241,086.96</td>
<td>3,133</td>
<td>10,026</td>
<td>24.05</td>
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<tr>
<td>14</td>
<td>Cambodia</td>
<td>212.31</td>
<td>212,310.48</td>
<td>2,149</td>
<td>6,877</td>
<td>30.87</td>
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<td>207,621.70</td>
<td>4,271</td>
<td>13,667</td>
<td>15.19</td>
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<tr>
<td>16</td>
<td>Laos</td>
<td>79.72</td>
<td>79,721.29</td>
<td>2,521</td>
<td>8,067</td>
<td>9.88</td>
</tr>
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Source: IMF - World Bank - CIA
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<td>Japan</td>
<td>1,266.79</td>
<td>1,266,794.87</td>
<td>100,560</td>
<td>12.60</td>
</tr>
<tr>
<td>3</td>
<td>Australia</td>
<td>1,345.25</td>
<td>1,345,254.55</td>
<td>114,138</td>
<td>11.79</td>
</tr>
<tr>
<td>5</td>
<td>South Korea</td>
<td>950.93</td>
<td>950,925.31</td>
<td>89,568</td>
<td>10.62</td>
</tr>
<tr>
<td>16</td>
<td>Laos</td>
<td>79.72</td>
<td>79,721.29</td>
<td>8,067</td>
<td>9.88</td>
</tr>
<tr>
<td>6</td>
<td>Taiwan</td>
<td>911.38</td>
<td>911,379.60</td>
<td>107,546</td>
<td>8.47</td>
</tr>
<tr>
<td>11</td>
<td>Malaysia</td>
<td>367.42</td>
<td>367,418.25</td>
<td>54,546</td>
<td>6.74</td>
</tr>
<tr>
<td>7</td>
<td>Brunei</td>
<td>847.36</td>
<td>847,359.72</td>
<td>147,130</td>
<td>5.76</td>
</tr>
</tbody>
</table>

Source: IMF - World Bank - CIA
MALAYSIAN PROPERTY MARKET SUSTAINABILITY

Kuantan: the new commercial port, the already committed investment from Chinese, European and American Multinational Corporation

Kota Baru: the Northern Educational Hub with 15 Local and International Universities already working to establish a northern campus

Penang: the 8th destination worldwide to retire.

Ipoh: retirement homes and health tourism

Klang Valley: the Northern, Southern and Western Corridor and the Megaprojects

Malacca: upcoming star in the Malaysian market as world tourist destination.

Iskandar Malaysia: the most Strategically Sustainable Location in the region (SEA)
KL – GREATER KL – KLANG VALLEY ... AND BEYOND

Klang Valley 1990

Klang Valley 2012

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KL – GREATER KL – KLANG VALLEY ... AND BEYOND
KL – GREATER KL – KLANG VALLEY … AND BEYOND

Klang Valley view from 130 km

Hong Kong view from 130 km

Klang Valley: 7,800,000 population

Hong Kong: 7,200,000 population

Just a consideration on how Greater KL should evolve...
KL – GREATER KL – KLANG VALLEY ... AND BEYOND
KL – GREATER KL – KLANG VALLEY ... AND BEYOND
KL – GREATER KL – KLANG VALLEY ... AND BEYOND
KLANG VALLEY AND THE SOUTHERN CORRIDOR
KLANG VALLEY AND THE SOUTHERN CORRIDOR
The return of Cyberjaya

Cyberjaya Achievements as at 2013:

- Over 500 MSC Status companies, Research Laboratories and Training Centers have relocated their HQ in Cyberjaya
Cyberjaya Achievements as at 2013:

- Multiledia Univeristy, LimKokWin University of Creative technology, University Malaysia of Computer Science & Engineering, Cyberjaya University College of Medical Science, Cyber Putra College and Kirby International College……. Just to mention a few

- Almost 70,000 population

- Infrastructures completed: MAJU Expressway, SKVE, Elite, LDP, Silk

- Under construction: MRT Line 2 – Putrajaya Central

- Planned: KIDEX-SKIP
KLANG VALLEY AND THE SOUTHERN CORRIDOR
The return of Cyberjaya
KLANG VALLEY AND THE SOUTHERN CORRIDOR

The return of Cyberjaya
KL – GREATER KL – KLANG VALLEY ... AND OFFICE SPACE

KL METROPOLIS

WARISAN MERDEKA

Bukit Bintang City Centre – Ex Pudu Jail

IN ONLY 4 KM RADIUS

KL Central

TRX

City of Malaysia

KL Eco City

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GREATER KL, KLANG VALLEY AND THE FUTURE OF COMMERCIAL PROPERTIES

EDGE WEEKLY. MEDIA SOURCES, CIMB
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HOW?
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THE FUTURE OF COMMERCIAL PROPERTIES
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MALAYSIAN REAL ESTATE: HOW
Learn how to be a wise smart investor
MALAYSIAN REAL ESTATE: HOW

Learn how to be a wise smart investor
Thank you

Facebook Daniele Gambero

For questions please email to: daniele.g@reigroup.com.my