

Press release

BEOS AG launches new corporate real estate fund with more than EUR 600 million investment volume

Berlin, 27 June 2025: BEOS AG continues with its successful series of CREFG funds in its fifth generation and in June 2025, launched a new special AIF via Swiss Life Kapitalverwaltungsgesellschaft mbH focusing on corporate real estate at the top seven locations and emerging growth regions in Germany. The planned fund volume is in excess of EUR 600 million. Aimed at institutional investors in Germany, the fund will target annual returns of more than 5% on invested capital and a total return of more than 6%.

BEOS Corporate Real Estate Fund Germany V (BEOS CREFG V) began with a selected group of investors and had, by the end of June, already received secured capital commitments allowing to invest a three-digit million sum. There is also further specific demand from investors. In addition, other investor interests are currently under being reviewed.

BEOS CREFG V focuses on properties with alternative uses, such as industrial parks and warehouse/production properties from the Core/Core+ segment with a diversified tenant base. With its SFDR Article 8 disclosure, BEOS CREFG V is also integrating environmental and social characteristics into its investment strategy.

“With the latest version of BEOS Corporate Real Estate Fund Germany V, we are targeting investments in corporate real estate that have proven stable even in the challenging market phases of the past. Attractive investment opportunities are

already emerging in the current market environment, which we will carefully analyse and exploit over the long term. At the same time, we are pleased with the continued interest from further potential investors and are currently reviewing further enquiries from investors,” explains Michael Kapler, Head of Portfolio Management and, as of 1 July, a member of the Executive Board of BEOS AG. “Our aim is to provide institutional investors with structured access to stable, value-adding properties.”

BEOS AG brings its long-standing, proven expertise to the fund as an active asset manager, while Swiss Life KVG acts as an alternative investment fund manager (AIFM). This strategic partnership will ensure that the fund is optimally managed and that its capital appreciates over the long term.

About BEOS

BEOS AG is one of the leading asset managers and project developers of corporate real estate in Germany. Founded in 1997, with an interdisciplinary team of around 250 people, the company manages a portfolio of mixed-use commercial real estate with around 4.4 million square metres of rental space and over EUR 7.3 billion in assets under management (based on gross fund assets, as at 30 December 2024). In addition to the existing portfolio, more than 270 000 square metres of new construction space are planned in the next few years, almost 100 000 of which are already being realised. BEOS is a service provider under the Swiss Life Asset Managers’ umbrella for institutional investors’ portfolio properties in all major German cities. With its special funds, it has provided an avenue since 2010 for German institutional investors to enter the fast-growing corporate real estate asset class.

BEOS AG is one of the best employers in the SME and real estate sector: in the 2023 employer ranking published by the journal “Immobilienzeitung”, graduates in real estate voted BEOS among the best employers in Germany for the sixth consecutive year. The BEOS team also won the Scope Award (2024) in the category “Best Asset Manager Real Estate Specialist Germany”.

Disclaimer

The contents of this press release are intended solely for information about the “BEOS CREFG V” fund and its management by Swiss Life Kapitalverwaltungsgesellschaft mbH and BEOS AG as its outsourcing partner. This information cannot and should not replace individual advice. It does not constitute investment, legal or tax advice.

Units of funds are purchased exclusively on the basis of the current contractual documents and the sales documents required by law; these are available from Swiss Life Kapitalverwaltungsgesellschaft mbH.

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