

A man with a grey beard and glasses, wearing a dark suit jacket over a light-colored shirt, is smiling slightly. He is standing in front of a blurred background of a city street with buildings. The overall tone is professional and approachable.

broll

BROLL PROPERTY GROUP

Our Company Overview

Professional Real Estate Services Since 1975

Progressive Property People.

A decorative graphic consisting of two concentric circles, one red and one white, with a small red dot to the left of the inner circle.

Our Mission

To build a high-performance, respectful and dynamic culture that enables tech-led professional real estate services, driven through trusted internal and external relationships.

Our Purpose

To be the leading real estate services provider and the preferred place of employment for our industry's professionals.

This purpose promotes constant innovation and service excellence whilst providing end-to-end real estate solutions to our valued clients.

Our Approach

Progressive | Property | People



Progressive, Cutting-edge Technologies.

We pride ourselves on our progressive and innovative culture, which is demonstrated through our **incomparable operational efficiency at every level.**

Our **industry-leading patented technology platforms** enhance and enrich asset values in the efforts of achieving **sustainable real estate success and long-term returns.**



End-to-end Real Estate Solutions.

We deliver **strategic, fully-integrated, professional real estate services** for both the investor and occupier markets, and everything in between...

Our success is built on a **'we know real estate'** culture, which stems from our tangible understanding of local markets across Africa.



Passionate & Skilled Professionals.

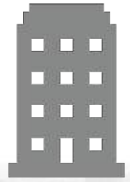
Our people are our assets. Their combined knowledge, unique expertise, unparalleled know-how, skills, integrity, loyalty and **professionalism is our differentiator.**

We are passionate about long-standing relationships, internally and externally.



Our Group Capabilities

World-class services leading to sustainable real estate success.



1975

Broll Property Group
Established



1,500+
South Africa

600+
Outside of SA



Sustainable & Compliant Systems

ISO 9001 QMS
ISO 45001 OHS
ISO 14001



7,400 Vendor Relationships

Manage **17** of the
largest listed funds
in Africa

51%

Black-Women
Owned



Assets Under
Occupier
Management
\$4bn

Total Value
of Properties
Valued *
\$6bn

Space Under
Management



44,5m m²

\$18.2bn



Total Value
of Assets
Under
Management

19,000+

Leases
Managed



\$3.7bn

Assets Under
Facilities
Management

36+ international
property services -
excellence awards

*Africa, Annually

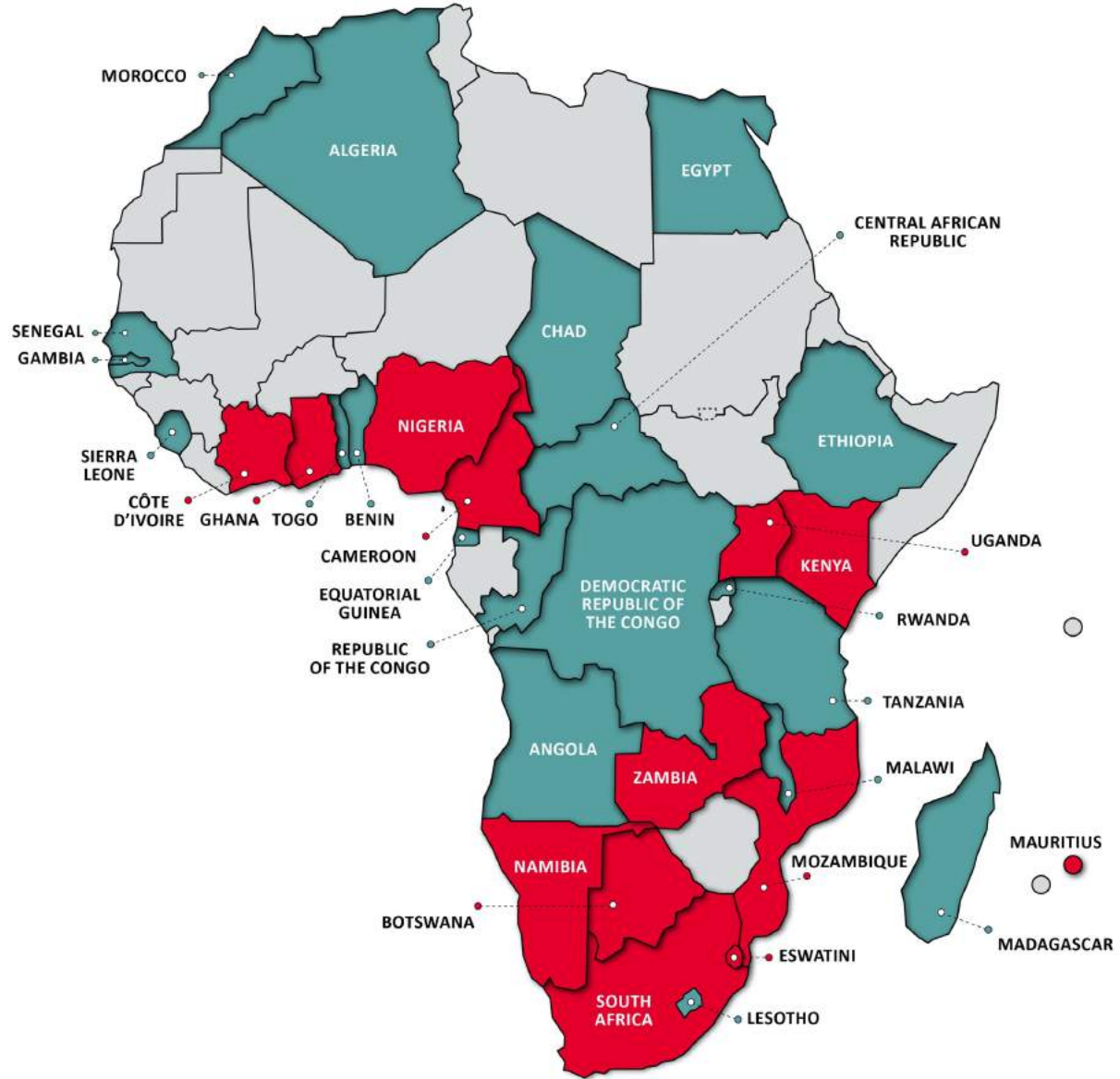
Our Property Management Capabilities

Offering Professional Real Estate Services for 49 years.

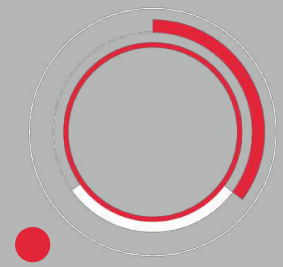


Our Pan-African Coverage

A proudly South African business, with a footprint across Africa.



- Physical Presence
- Recent Executions
- Ad-hoc / Team can be mobilized



Our Service Lines & Growth Trajectory

Decades of continued progress.



1975

- Property Management

1995

- Retail Leasing
- Broking & Sales



2010

- Valuations & Advisory Facilities Management Occupier Services
- Intel/Research

Africa Expansion

- 2003 Namibia
- 2004 Nigeria
- 2006 Ghana
- 2007 Malawi
- 2013 Rwanda
- 2013 Indian Ocean

2018

- Auctions & Sales

- 2013 Mauritius
- 2013 Kenya
- 2013 Zambia
- 2014 Botswana
- 2014 Zimbabwe
- 2015 Ivory Coast
- 2015 Mozambique
- 2015 Uganda
- 2018 Gabon



2019

- 51% Black Women Owned & Level 1 B-BBEE (SA)
- Cushman & Wakefield Affiliation with our Occupier Services Division
- Internal Developers (Workplace Strategy)

2020

- Broll Soft Services (BSS)
- Broll Risk Management

2022

- Broll EWS (Energy, Water & Sustainability)
- Acquisition of ARM - plumbing, electrical and maintenance
- A JV with Drivay International - a tech solution for industrial camp issues.

Our Accolades

Recent highlights of industry recognition.

2016

Broll Property Group
Advisors and Consultants – 1st place in Africa - Euromoney Awards

Advisors and Consultants for Agency/Letting – 1st place - Euromoney Awards

Advisors and Consultants for Research – 1st place - Euromoney Awards

Broll South Africa
Advisors and Consultants – 1st place in Africa - Euromoney Awards

Advisors and Consultants for Agency/Letting – 1st place - Euromoney Awards

Advisors and Consultants for Valuation – 1st place - Euromoney Awards

Broll Ghana
Real Estate Advisors and Consultants – 1st place - Euromoney Awards

Advisors and Consultants for Agency/Letting – 1st place - Euromoney Awards

Advisors and Consultants for Valuation – 1st place - Euromoney Awards

Advisors and Consultants for Research – 1st place - Euromoney Awards

Property Management Firm of the Year - Ghana Property Awards

Broll Nigeria
Advisors and Consultants for Agency/Letting – 1st place - Euromoney Awards

Advisors and Consultants for Research – 1st place - Euromoney Awards

2017

Broll Facilities Management
PMR Silver Arrow Award - National Survey on External Facilities Management Companies

2018

South Africa Facilities Management Young Achiever of the Year - Gold - Chanté Jordaan

Kenya Facilities Management Young Achiever of the Year - Gold - Jacklyn Mwangi

Woman's Property Network - Professional of the Year – Jess Cleland

Admitted as an Advocate Fathima Karolia

Broll Nigeria
Real Estate Service Company of the Year

2019

Broll Namibia
Great Place To Work – Small Business Category - 4th Place

Broll Facilities Management
PMR Gold Arrow Award - National Survey on External Facilities Management Companies

Broll Property Group
PMR Gold Arrow Award - National Survey on External Facilities Management Companies

2020

Broll Property Group
Advisors and Consultants for Agency - Letting/sales - 1st place in Middle East – North Africa - Euromoney Real Estate Survey

Advisors and Consultants for research - 1st place in Middle East – North Africa - Euromoney Real Estate Survey

3rd overall in Middle East – North Africa - Euromoney Real Estate Survey

Broll Facilities Management
PMR Gold Arrow Award - National Survey on External Facilities Management Companies

Broll Nigeria
Advisors and Consultants - 1st place in Nigeria - Euromoney Real Estate Survey

Advisors and Consultants for Agency - Letting/sales - 1st place in Nigeria - Euromoney Real Estate Survey

Advisors and Consultants for Research - 1st place in Nigeria - Euromoney Real Estate Survey

2022

Malcolm Horne (Group CEO)
Awarded "Africa CEO 2022 - Industry Category Winner - Real Estate" by CEO Today Magazine

Broll Property Group
Euromoney Awards 2022, first in the following categories:
- Advisors & Consultants: Overall (Africa)
- Letting/Broking & Sales (Africa)
- Property Valuations (Africa)

Malcolm Horne (Group CEO)
African Property Investment (API Events) honoured with a Lifetime Achievement Award.

Broll Facilities Management
PMR Gold Arrow Award – National Survey on External Facilities Management Companies

Broll Ghana
Ghana Club 100 Awards, Top 100 outstanding companies in Ghana

2023

Broll Property Group
MEA Business Awards - Best Commercial Property Services – Africa

Broll Facilities Management
PMR Gold Arrow Award – National Survey on External Facilities Management Companies

Broll Uganda
Consumer Choice Awards - Platinum Winner - Best Real Estate Consultants & Developers Company

Broll Ghana –
Ghana Club 100 Awards – Top 100 Prestigious Companies



Our Group Executive Leadership Team

100+ years of combined experience.



BPG Board of Directors

- Jonathan Broll *
- Savi Perumal * **
- Malcolm Horne (Group CEO)
- Elscke Badenhorst (Group CFO)
- Royden Du Plooy * **

* Non – Executive Director
 ** Alternate Director – R Du Plooy is an Alternate Director to S Perumal

Group CEO Malcolm Horne



Elscke Badenhorst

- Group Finance
- Group Legal
- Group Risk
- Group IT
- Company Secretary



Ken Gerber

- Occupier Services
- Strategy & Consulting
- Transaction Services
- Client Solutions
- Valuations & Advisory
- Capital Markets
- Internal Developers (separate legal entity)
- Broll Auctions & Sales (separate legal entity)
- Broll Risk Management (separate legal entity)



Surine Griffin

- Property Management
- Retail Leasing
- Sectional Title Management
- EWS (Energy, Water & Sustainability)



Vacant

- Integrated Facility Management Services
- Technical Services
- Soft Services (Cleaning, Hygiene, Landscaping & Pest Control)



'Mantsi Moiloa

- Establishing & nurturing strategic ties in Local, Provincial, & National government.



Inge Wessels

- Financial Oversight
- Market Expansion & Development
- Operational Management
- Stakeholder Relations

Testimonials

Some feedback from our valued clients on our strategic expertise.

broll

//

*Broll always show their utmost **dedication and resilience**, especially during trying times.*

*They remain consistent, and always ensure that all our centres are managed well and **deliver a quality service to all tenants and shoppers.***

//

Johann Kriek

Executive Director, Resilient REIT Limited



“Broll has a unique ability of keeping up **high levels of communication between landlord, tenants and all stakeholders involved**, and have always managed to minimise the risks involved and yet still always deliver a quality shopping experience to the public.

The strength and expertise of all involved during 2020 made an extraordinarily difficult period bearable and together we are recovering from it.”



**Vuso Majija, Retail Executive Director
Fortress Income Fund**

//

We recognise and appreciate Broll for going the extra mile. They have demonstrated a willingness and ability to do more than what was expected of them to ensure the successful execution of a project.

//

Wojciech Mekwinski

Network Delivery Manager: Shell

// Just as Discovery is known for its innovative capabilities, we have found that Broll match that attribute in the services and advice they provide, resulting in substantial savings over the years.

The Broll team have been stable, yet dynamic, proactive and energetic in meeting our real estate requirements. //

John Robertson

Executive Director: Discovery Holdings

Our Full Spectrum Market Coverage

One integrated, excellence-led platform.



**PROPERTY
MANAGEMENT**



**TRANSACTION AND
CONSULTANCY SERVICES**



**INTEGRATED FACILITIES
MANAGEMENT**



**VALUATION AND
ADVISORY SERVICES**



**INTEL AND
MARKET ANALYSIS**



**TECHNOLOGY AND
PROPTECH SOLUTIONS**

Property Management & Retail Leasing

Robust range of investor services designed to drive real estate performance and asset value.

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Our Value Proposition

No other independent service provider has Broll's expertise and proven track record when it comes to property management in South Africa – since 1975! We deliver superior returns - something that we've consistently achieved, even in the toughest of market conditions.

That's why some of Africa's largest portfolios, both listed and private are entrusted us with their assets.



Professional Industry Associations

- Estate Agency Affairs Board (EAAB)
- South African Council of Shopping Centre (SACSC)
- South African Property Owners Association (SAPOA)
- South African Institute of Black Property Professionals (SAIBPP)
- Institute of Real Estate Management (IREM)
- Green Building Council of South Africa (GBCSA)

Our Services

Property management

Retail leasing & consulting

Lease renewal negotiations

Vacant space management

Project management

Tenant co-ordination

Manage buildings for sustainability

Carbon intelligence advisory

Energy consumption management & efficiencies

Insurance compliance

Financial accounting & management

Rent recoveries & accounts payment

Building sales & feasibilities

Datamart licences for asset management

Service provider accreditation, procurement & management

Commercial, residential & leisure management services

Budgeting & forecasting maintenance management risk & compliance

Sectional title property management

Strategic brand advisory services, communication, marketing implementation, research & campaigns

Manage 17 of the largest listed funds in Africa **17**

Property management personnel **900**

Properties under management **1,200**

Certified **ISO 9001: 2015**

Brandvisors™ (Mall Marketing & Communications)

We align brand strategy and asset strategy to create opportunities for growth.



BRANDVISORS
marketing • brand • communication

Our Value Proposition

A turnkey marketing solution that includes in-house marketing, events and brand strategy. Let us be your voice, its not just what you say but how you say it. As specialists in retail marketing, leverage off our diverse brand advisory, promotional, media, digital and non-GLA income strategies into a profit centre for your asset!

Our marketing roots run deep, and our branches of creativity stretch out far beyond the rest.



Our Services

- Launch strategies of newly built shopping centres
- Re-launch strategies of renovated & re-engineered shopping centres
- Annual marketing strategies
- Retail Intervention strategies
- Brand strategies
- On-site marketing Management
- Communication strategies
- Disaster management communication plan
- Campaign management
- Campaign creative Development
- Digital & social media marketing
- Marketing budget management
- Exhibitions & display management
- NON-GLA Strategy: Service provider management
- Sponsorship opportunities planning & income stream management
- Service ambassador training
- Supplier development
- Media strategy, buying & budget optimisation
- Event strategy, planning & execution

Footprint Marketing Awards (SACSC) **19**

In-House Mall Marketing Teams **22**

Marketing Promotions Annually **328**

Non-GLA Initiatives Annually **120**

Our Value Proposition

We allow technology to lead the way in serving the rapidly changing needs and requirements of our clients, and the market. Our real estate related technologies are distinctive in creating and delivering real value.

Our in-house IT team ensures integration synergies across the continent, leveraging combined systems and aggregated data for continuous improvement.

Integrated PropTech Solutions Providing:

- Improved information quality.
- Better transparency on portfolio performance.
- Enables faster decision making.
- Anticipated trends to inform planning and strategy.
- Identification of risks and opportunities.
- Integrates resources, skills and people on-the-ground.

Multiple Platforms Offered and Supported:

- B# (Broll Online)
- Straight-line reporting automated.
- IFRS16 solution projects.
- ISO 9001:2015 certification underway.

Our Services

Dedicated technology development team

Software development

Mobile apps

Data migration

Information security audits

Software development

Disaster recovery & business continuity

Digital framework risk audits

Support and training

Bulk batch data cleaning

System Statistics

200+ Call centers/fault centers

4,000+ Calls/faults per month



In-house **12**
IT professionals

End-users supported
daily across Africa **2,000**

Support to **100**
remotes sites

Our Value Proposition

b# is the leading real estate solution that seamlessly integrates property and facilities management with financial and business intelligence. Don't just manage your real estate – maximise your assets. Imagine countless manhours saved, predictive patterning, consistent reporting, and streamlined processes.

Integrated Solution Providing:

- Fully integrated “ready to go” platform; integrating tenants, landlords, property managers all into a single view platform.
- Robust Microsoft Architecture.
- Information anytime, anywhere on any device securely.
- Empowering the mobile workforce, enhancing efficiency and information accuracy.
- System employs role based as well as building level security.
- All activity and actions are contained in audit trails.
- Adaptable and flexible, capable of integrating into any third-party system.

Market leading proprietary software:

- | | |
|-----------------------------------|--|
| Real-time asset management | Lease admin & tracking |
| Financial reporting | Turnover reporting & analysis |
| Admin control | |
| Budgets | Multiple premises procurement management |
| Multiple building portfolio | Receipting |
| Multi-currency financial software | Live reporting |
| Debtors' journals | Retail management suppliers |
| Document centre | |
| Fault centre | Tenant queries |
| GL account | Utilities management & reporting |
| Queries/journals | |



(Previously Broll-Online)

Our Value Proposition

To boost profitability and achieve new cost efficiencies in today's competitive marketplace, companies must focus more on their core business functions and outsource their non-core activities to facilities management service providers. Integrated facilities management, is one of the best ways to consolidate all services under a single management team and contract. Integrating with your systems and business processes, we deliver a that saves costs, improves asset utilisation and overall service delivery. Whilst providing accredited specialists and Broll personnel to perform the specific services required.

Notable Recent Transactions

- Private Sector: Hollard – Fully Integrated FM Solution.
- DBSA/DPW : Civitas/Batho Pele House – Fully Integrated FM Solution.
- DTIC – 5-year contract – Fully Integrated FM Solution.
- MTN Nigeria – New Head Office Construction Project Management.
- Afreximbank - FM Consultants for new Africa HQ's.
- DPWI – 3-year appointment to FM Panel.

Professional Industry Associations

- South African Facilities Management Association (SAFMA)
- South African Council of Shopping Centre (SACSC)
- South African Property Owners Association (SAPOA)
- Green Buildings South Africa (GBSA)

Comprehensive Solutions for all Onsite Facilities-Related Activities

Broll Technical Services:

HVAC maintenance

Boiler maintenance

Building & infrastructure maintenance

Building management systems

Diesel bulk storage

Electrical supply & reticulation

Fire detection & suppression maintenance

Gas supply

Key & lock management

Lift & hoist maintenance

Parking management

Ponds & fountains maintenance

Refrigeration

Security & access system management & monitoring

Signage

Utilities management

Water reticulation

Professional Services:

Occupational health & safety consulting services

Call centre & 24/7 help desk

Occupational health & safety consulting services

Statutory compliance audits

Asset condition audits & total lifecycle management

Asset tagging & verification

Environmental management

Streamlined supply chain management

Advisory technology solutions

Accounts payable solution

Skills development & training

Broll Vantage

Supplier Portal,
Online Vetting
Process, RFQs,
Invoicing,
Approvals,
Integrated to
finance system,
reporting.

**Integrated
Technology
Platform**

**Energy, Water &
Sustainability
Solutions**

**ISO certified FM
Processes &
Certified TÜV
Rheinland**

4,000

Help Centre Calls
p/m

7,400

Suppliers

Broll Soft Services

Improving environments, improving lives.

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Our Value Proposition

As a division of our Integrated Facilities Management cluster, we provide premium, compliant services in commercial cleaning, landscaping, waste management, hygiene, and pest control. Our commitment to excellence is evident in every job we complete whilst providing a healthier working environment thus improving morale and productivity. Our specialist cleaning services are tailor-made for your facility which include Hygiene Services and Pest Control, Landscaping, Waste Management and a comprehensive Cleaning Service.

Ensuring a full service, we are focused to meet your social responsibility needs and business compliance requirements with our dedicated, skilled, well-trained and motivated teams to best serve your facility.

Going above and beyond your expectations is achieved through personalised services and attention to detail whilst being environmentally conscious (using eco-friendly & bio-degradable, environmentally safe) products and offering industry competitive pricing.

Certifications:

- ISO, RMI, ISSA, NCCA, Services SETA

Industries Served:

- Property Funds
- Retail Stores and Shopping Centres
- Commercial Buildings and Industrial Buildings
- Government and Education Sector
- Residential Properties and estates
- Complex Medical and Dental Centres
- Nursing homes

Our Services

Cleaning Services

- General office cleaning
- Solar panel cleaning
- Warehouse cleaning
- Carpet deep cleaning
- Upholstery cleaning
- High access cleaning
- Deep cleaning

Landscaping

- Green maintenance & refuse removal
- Specialised green services (ad-hoc)
- Irrigation
- Design, installation, maintenance of interior plants

Waste Management

- Commercial & retail waste management services
- Recycling services

Hygiene Services

- Installation & maintenance of hygiene equipment
- Consumables supply
- Anti-microbial fogging & decontamination services
- Hazardous waste removal

Pest Control Services:

- Rodent control (bait installation & management)
- Fumigation
- Insect light traps
- Insect control
- Exclusion material



Occupier & Transactions Management

People-Centred. Technology-Enabled. Knowledge-Based.



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Our Value Proposition

Whether your focus is on single or multiple-property expansion, portfolio realignment, acquisition, disposition, or consolidation, we are fully geared to align your business needs with the right space, the right strategy—in the right locations to support your business growth and flexibility. We provide industry leading, fully-integrated digital platforms that connect individuals and corporates, sellers and buyers, landlords and lessees in real-time across multiple sectors.

Drawing from the global stage experience of our affiliate partners, *Cushman and Wakefield*, we deliver matchless property-transaction acumen in commercial and industrial real estate strategy, investment broking, and asset acquisition and disposal.

Notable Recent Transactions

- Vodacom, Johannesburg 18,000m² (Industrial Broking).
- R450m sale of Pick n Pay Hyper, Cape Town on behalf of Zenprop (Investment Broking).
- Mail and Guardian, Johannesburg 3,000m² (Office Broking).
- Citi Group – 3-year transaction/ tenant representation contract.

Professional Industry Associations

- Corporate Office Real Estate Network (CoreNet)
- South African Council of Shopping Centres (SACSC)
- South African Institute of Auctioneers (SAIA)
- The Institute of Risk Management South Africa (IRMSA)

Our Services

- Occupier services
- Estate management
- Portfolio strategy & renewals
- Workplace strategy
- Project management
- Turnkey design & build
- Tenant representation
- Brokerage/agency
- Auctions & sales
- Private treaty deals
- Capital markets
- Investment sales
- Strategic risk management
- Risk consulting, technology & project management

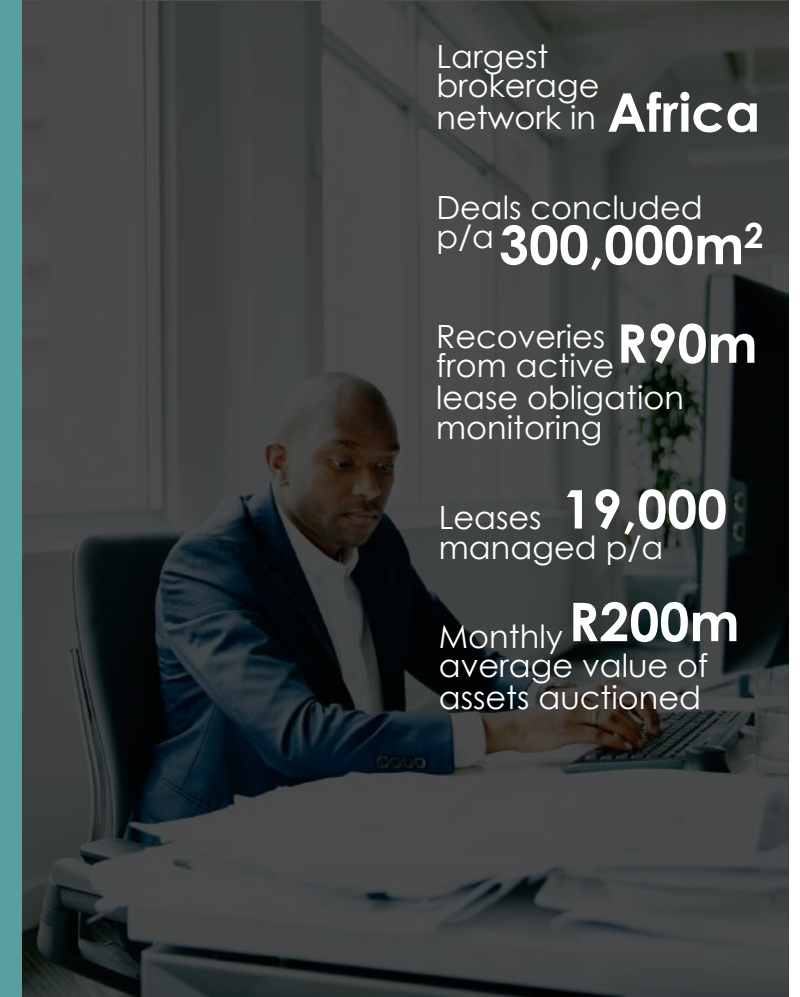
Largest brokerage network in **Africa**

Deals concluded p/a **300,000m²**

Recoveries from active lease obligation monitoring **R90m**

Leases managed p/a **19,000**

Monthly average value of assets auctioned **R200m**



Valuation & Advisory Services

Uncontested, knowledge-driven expertise in valuing.

broll

Our Value Proposition

We offer a highly professional service for the valuation of land and buildings, which includes real rights, servitudes and usufructs as well as plant and machinery assets. Valuations are also provided for sales and acquisitions, financial reporting, rental valuations, rating appeals and for insurance purposes. Additional services include due-diligence audits for property acquisitions and development appraisals.

Our team includes Chartered Surveyors and Professional Valuers registered with both the South African Council for the Property Valuers Profession and the South African Institute of Valuers. We comply with international best practice as set out in the RICS Red Book and with the guidelines adopted by the International Valuation Standards Committee.

Professional Industry Associations

- Royal Institution of Chartered Surveyors (RICS)
- International Valuations Standards Council (IVSC)
- South African Institution of Valuers (SAIV)
- South African Council of Shopping Centre (SACSC)
- South African Property Owners Association (SAPOA)

Our Services

What we value

Offices
Retail centres
Hotels
Industrial
Residential
Development land
Fuel stations
Specialised properties

Why we value

Sales & acquisitions
Financial reporting
Objections
Due diligences
Decision making
Secured lending

Whom we value

REITS & listed property companies
Developers
Private funds
Operational property
Multinationals

Total value of properties valued **\$6bn**

450
Real estate valuation and advisory assignments p/a



Intel & Market Analysis

Reliable sector-specific industry intelligence.

broll

Our Value Proposition

The role of today's real estate company has evolved. Intel is the the new commodity. Now, more than ever, we need to interpret, evaluate and disseminate information quickly before it becomes stale. Broll recognises this need and invests heavily in intel gathering to provide its clients with the level of information necessary to make the best decisions.

Our in-house team of experts have extensive industry experience in research-based real estate consulting and advisory services. This high-performance team conducts unique market analyses, which provide relevant insights about different market segments. These insights enable our clients to make informed, strategic and data-driven decisions.

Sector Access

Commercial

Retail

Industrial



Direct In-Country Insights

South Africa, Nigeria, Ghana, Cameroon, Cote d'Ivoire, Kenya, Uganda, Botswana, Namibia, Mozambique, Zambia, eSwatini, Mauritius.

Our Services

Country reports

Market studies

Location & nodal analysis/reports

Feasibility studies

Retail mapping

Portfolio optimisation & analysis

Benchmarking

Demographic analysis

Drive-time analysis

Competitor locations

Repositioning or relocating of stores within a shopping centre

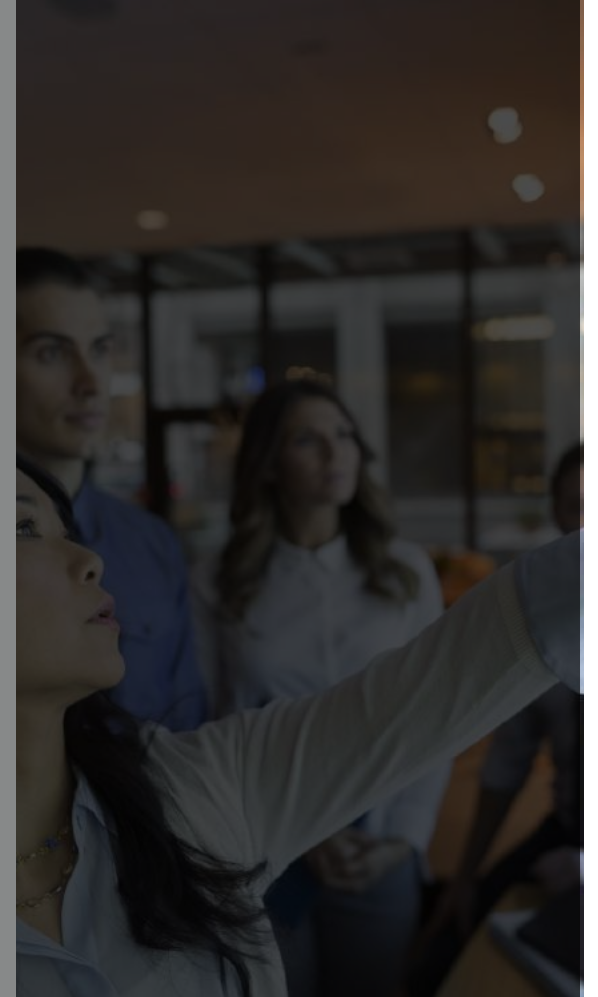
Development pipelines

Lease optimisation, acquisition and renewals

Tenure optimisation

Tenant represented research

Transaction workflow tracking





Thank you.

We look forward to bringing you our core competencies of professional real estate services.

Progressive Property People.

Supported by Shared Group Services

GROUP FINANCE

GROUP HUMAN CAPITAL

GROUP IT

GROUP BRAND, MARKETING & COMMUNICATIONS

GROUP LEGAL

GROUP RISK & COMPLIANCE