



SMART INVESTMENTS

**“WE ARE HERE TO CREATE THE MOST OPTIMAL REAL ESTATE
INVESTMENT PORTFOLIO FOR YOU”**



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A balanced investment portfolio should include both stocks and real estate. While stocks offer high return potential, their volatility increases the risk of losing principal.

Real estate, particularly cash-flowing properties like multifamily units, provides a better long-term investment strategy. These assets offer strong intrinsic value, potential appreciation in the right markets, and consistent cash flow.

Additionally, real estate has significant tax advantages, such as depreciation, which allows investors to keep more of their returns compared to stocks, even if both yield the same rate of return.



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MARKET CONSIDERATIONS



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THE SUN BELT'S CONTINUED DOMINANCE

2025 is going to be a BIG year for multifamily real estate! Get ready for growth, increased value and more exciting investments. Our first prediction is that Florida and other sunbelt states will continue to boom. People moving south, wanting to enjoy not paying any state income tax, and being in the warm sunshine helps push those wanting to make the move.

MIAMI, FL

Expected Sales Growth: 24.0%
Median Home Price Increase: 9.0%

Key Factors: Miami's international appeal, bolstered by a diverse cultural landscape, attracts both domestic and foreign buyers. The real estate market benefits from a healthy mix of high-value properties and more affordable housing options.

ORLANDO, FL

Expected Sales Growth: 15.2%
Median Home Price Increase: 12.1%

Key Factors: As a key tourist destination, Orlando's economy enjoys robust growth. The city's excellent schools and family-friendly attractions are drawing in new residents, while the construction of new homes continues ramping up.



South Florida's climate, strong job market, and tourism sector will support housing demand, preventing a market crash.



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THE SUN BELT'S CONTINUED DOMINANCE

JACKSONVILLE, FL

Expected Sales Growth: 13.5%
Median Home Price Increase: 9.8%

Key Factors: With its extensive coastlines, Jacksonville offers a desirable lifestyle for many incoming residents. The balanced job market and entertainment options continue to create an attractive environment for buyers.

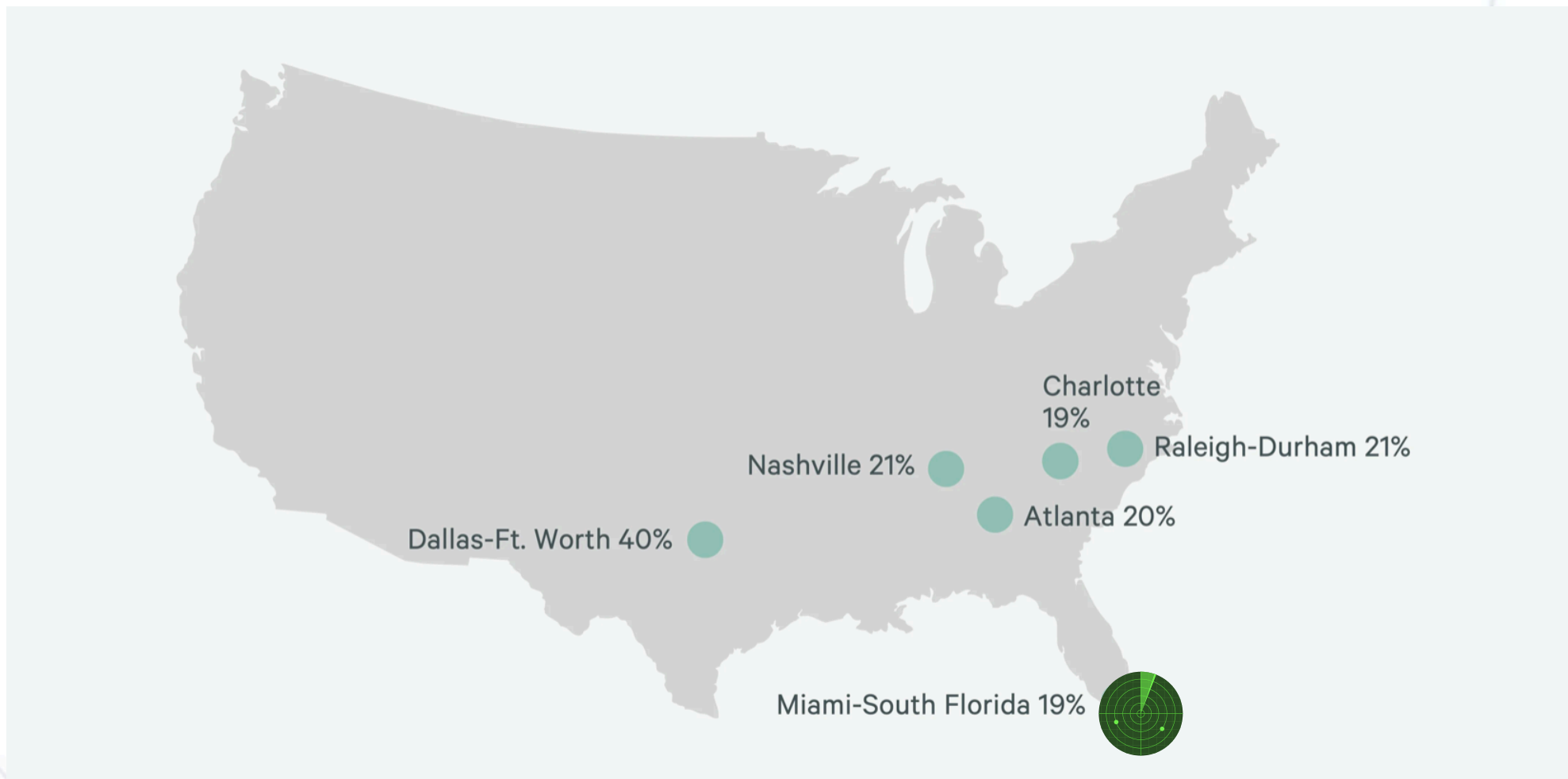
CAPE CORAL , FL

Expected Sales Growth: 13.2%
Median Home Price Increase: 9.6%

Key Factors: Cape Coral's reputation for beautiful waterfront properties and strong fishing and boating opportunities uniquely positions it among desirable locations for retirees and families alike.



TOP INVESTMENTS FOR MULTI- FAMILY



CBRE



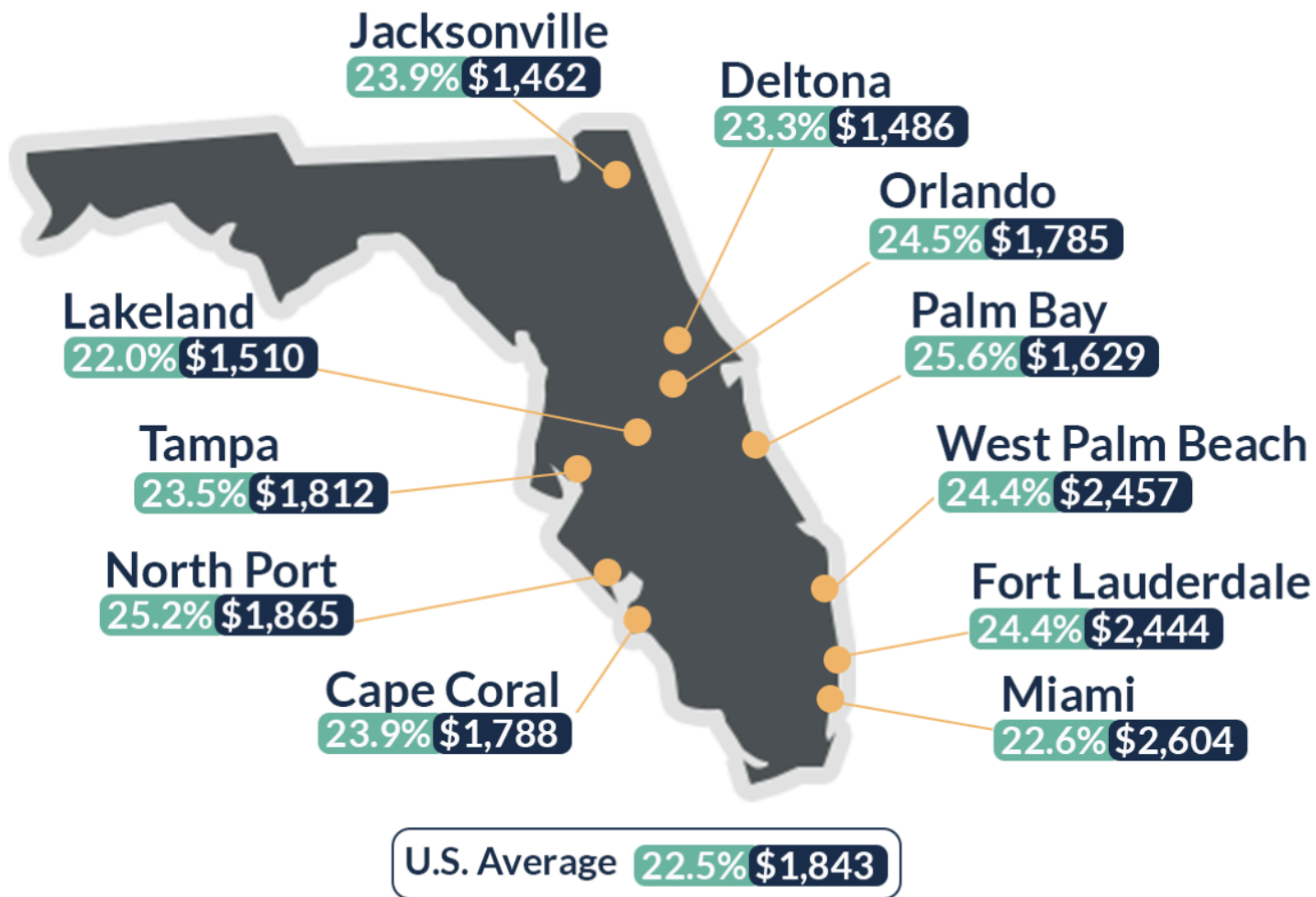
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RENT -TO -INCOME RATIOS ACCROSS FLORIDA



Median Rent-to-Income Ratio (T-12) Effective Rent

Data as of July 2024

Source: RealPage Market Analytics

REALPAGE



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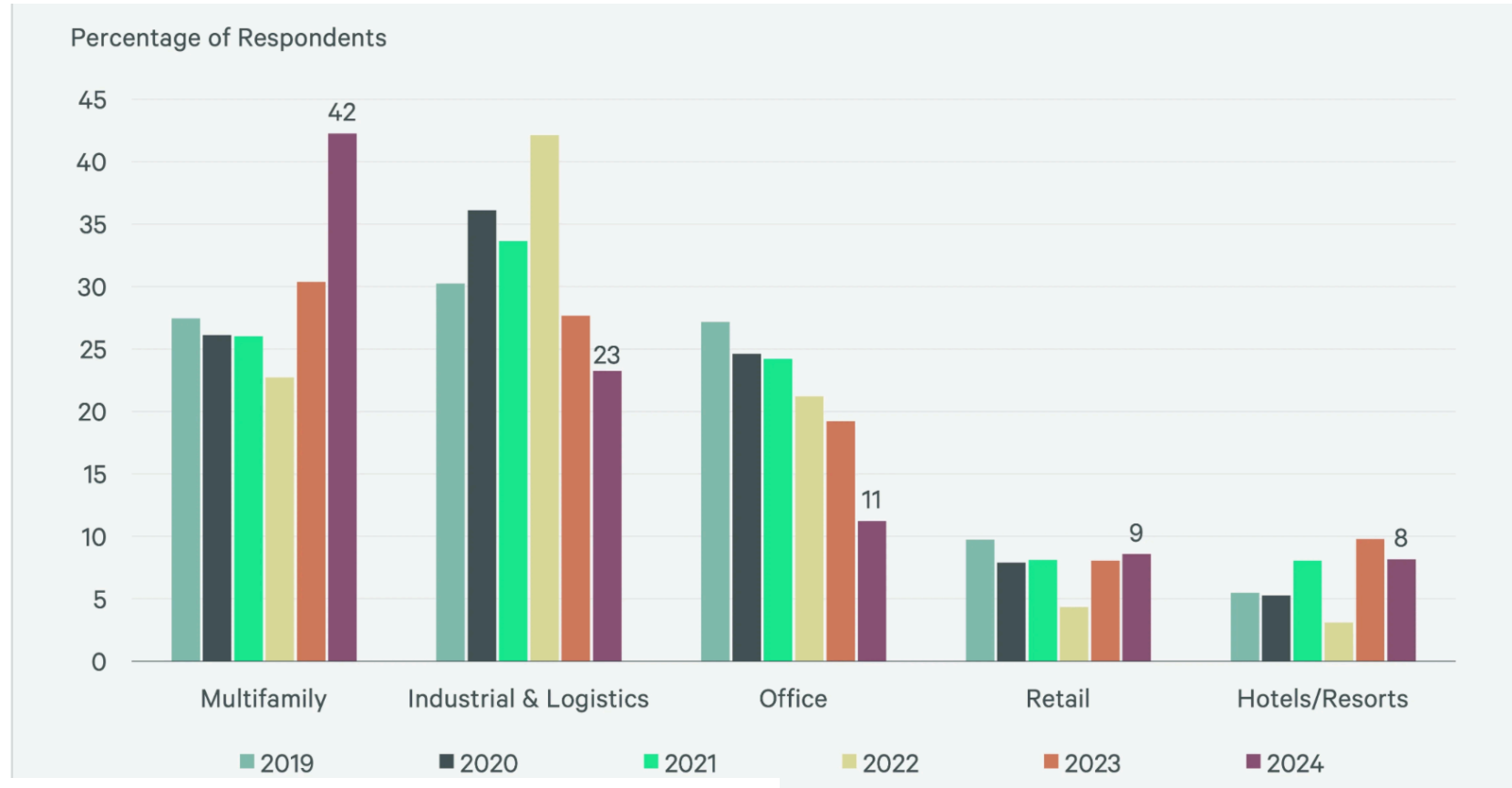


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INVESTORS SURVEY

CBRE Research forecasts U.S. multifamily investment volume to reach approximately \$200 billion by 2025. While this remains below the 2019 record level of \$191 billion, it marks a significant rebound from the pandemic's disruption and is a 12-15% increase over the 2024 estimate of \$185 billion.



Source: Regional investor intentions surveys, CBRE Research, Q1 2024.

CBRE



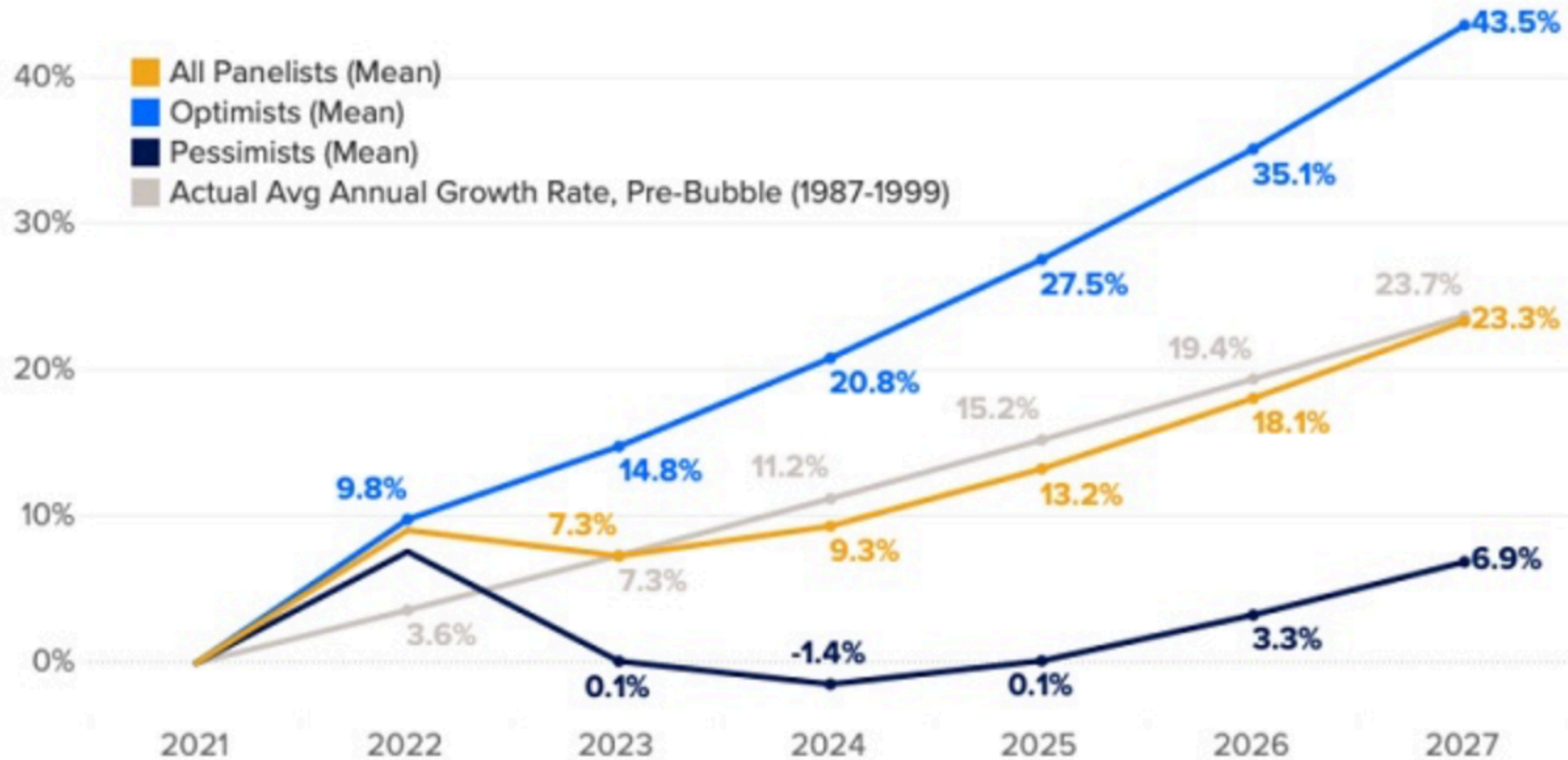
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U.S. HOME PRICE SCENARIOS / U.S. HOME PRICE GROWTH



Source: Q4 2022 Zillow Home Price Expectations Survey

Sustained demand for single-family and luxury homes will keep prices rising, although at a more moderate pace.



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30 YEAR MORTGAGE RATE FORECAST



Goldman Sachs

Lower mortgage rates and economic improvement will drive a recovery in home sales, particularly in luxury markets.



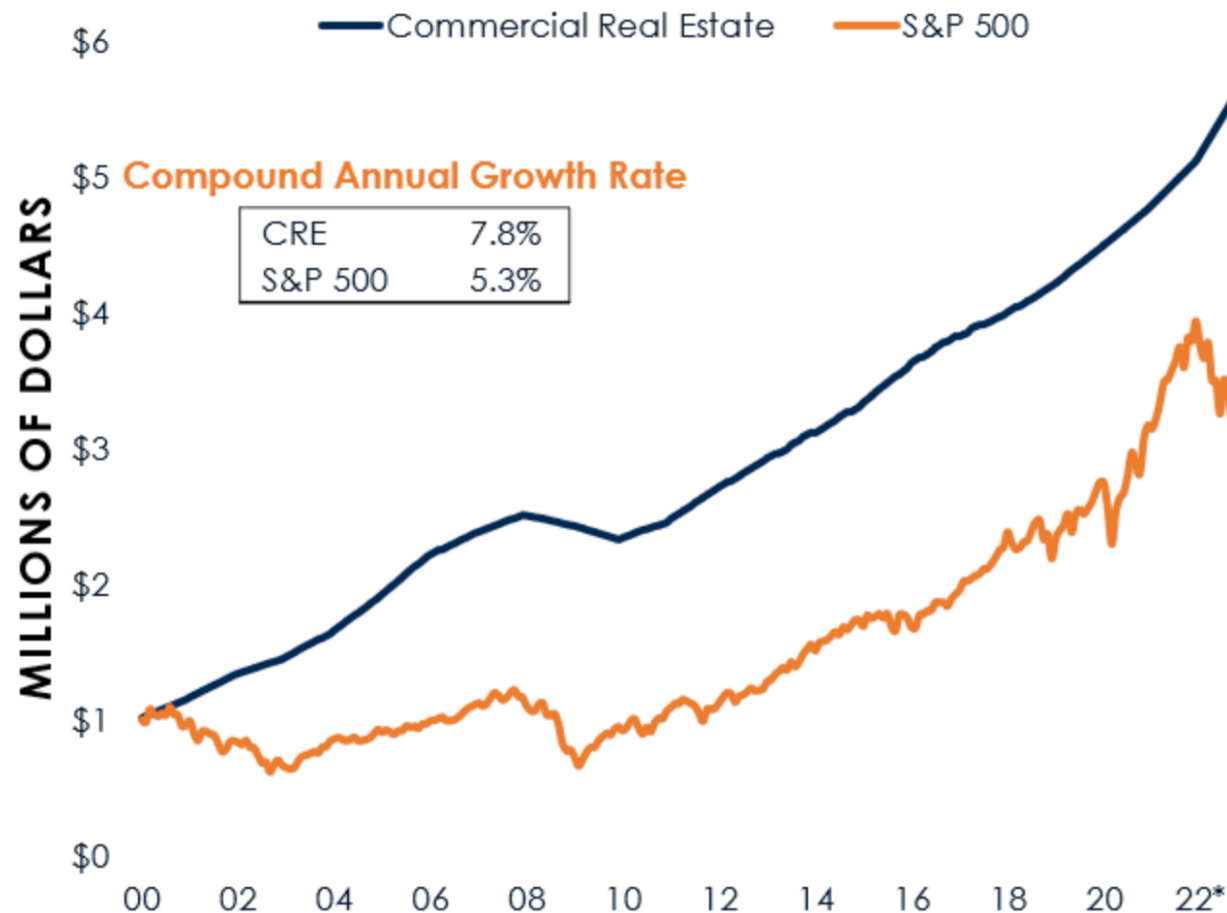
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Commercial Real Estate Returns Outpace S&P 500 Since 2000



October 3, 2022 by Marcus & Millichap Research Services

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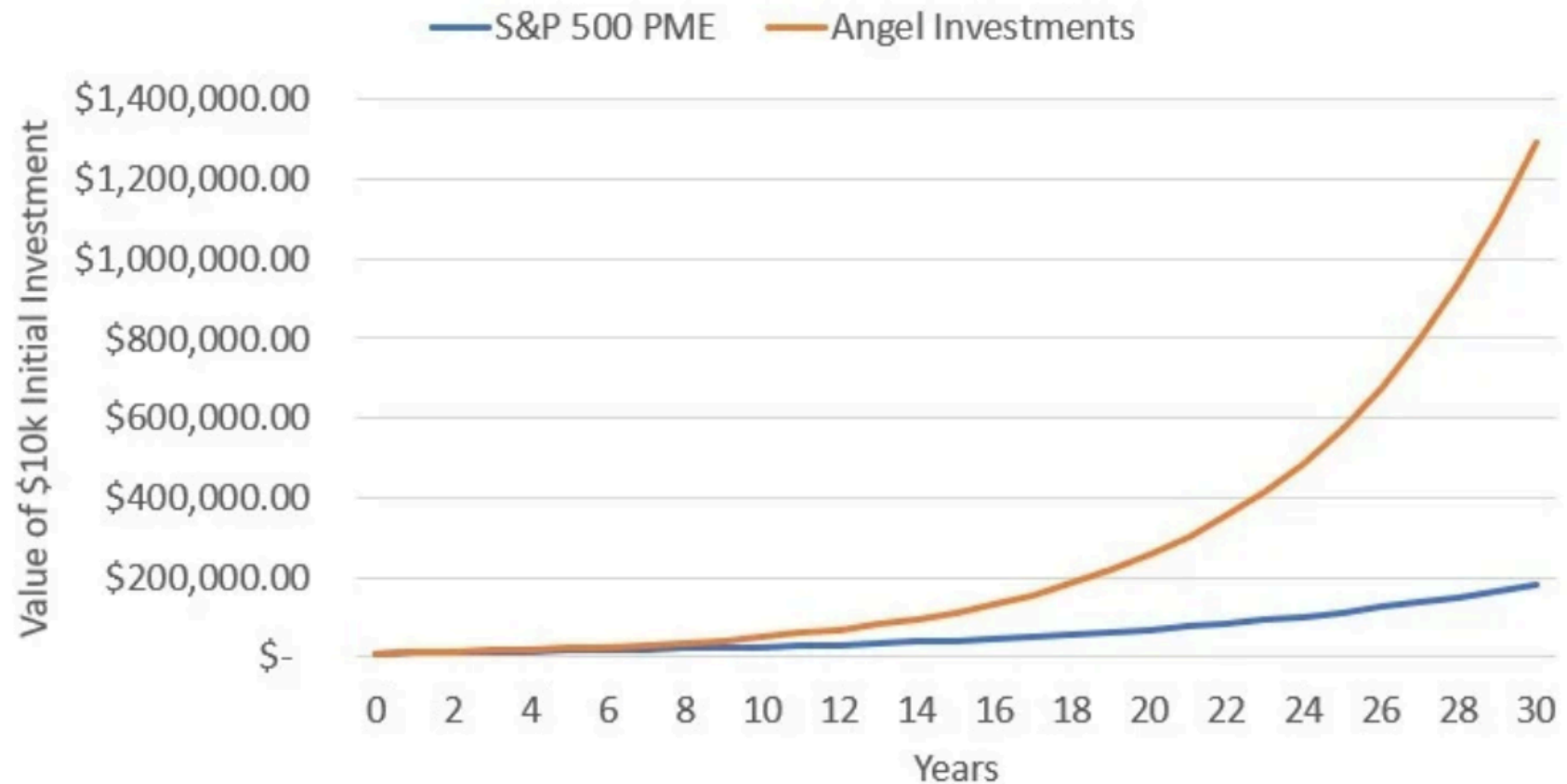
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S&P (10.2%) vs. Angel Investment (17.6%IRR) 30 -YR Growth of \$10,000 (2021)



TIME TO MAKE THE \$



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