



PRESS RELEASE

Interim statement of the manager on 30 September 2018

Regulated information under embargo
till 19 November 2018 –5.40 pm

Interim statement of the manager on 30 September 2018

- EPRA earnings*¹ Q3 2018 amount to € 25.1 million, a rise by 14% compared to Q3 2017
- The net result reaches € 27.2 million (€ 5.51 per share) versus € 29.7 million end Q3 2017
- Capital increase of € 83,960,790 successfully completed, resulting in a substantial decrease of approximately 7 percent points of the debt ratio
- The funding cost decreases from 2.99% end 2017 to 2.69% in Q3 2018
- Besides the promising acquisition of the building Montoyer 14 to redevelop, successful delivery of the building Montoyer 63 in the European headquarters (CBD) of Brussels

¹ Alternative Performance Measures (APM) in the meaning of the ESMA directive of 5 October 2015 in this press release are indicated with an asterisk (*) and are further explained in the annexes to this press release.

1. Activity report Q3 2018

Investments

Belgium

ACQUISITION OFFICE BUILDING MONTOYER 14 IN CBD OF BRUSSELS

On 14 September 2018, Leasinvest Real Estate signed a binding agreement with the fund Next Estate Income Fund ("NEIF"), managed by BNP Paribas REIM Luxembourg, relating to the acquisition of 100% of the shares of the company NEIF Montoyer SPRL, holding a leasehold with a remaining duration of 94 years on the office building Montoyer 14, situated at the angle of the rue Montoyer and rue de l'Industrie in BE-1000 Brussels. This transaction represents an investment of € 11.35 million, in line with the value estimated by the independent real estate expert. The Closing of this transaction took place on 15 October 2018.



After the departure of the current tenant (the United Nations) at the beginning of 2019, Montoyer 14 will be entirely redeveloped into an office building that should become the reference in newest technologies and sustainability. The project management is exercised by promoter Ion.

The new building is expected to comprise approximately 4,000 m² of state-of-the-art office space and to be delivered at the beginning of 2022.

For Leasinvest Real Estate, this is the third office project in the European district in Brussels in two years of time - after Treesquare (Square de Meeûs), let for 69%, and Montoyer 63 (rue Montoyer), for which a 21-year leasehold was concluded with the European Parliament (see below). This acquisition confirms Leasinvest Real

Estate's strategy to further develop its current offices portfolio with high-quality projects at top locations.

Developments

Belgium

OFFICE BUILDING MONTOYER 63 IN CBD OF BRUSSELS – PROVISIONAL ACCEPTANCE

The Montoyer 63 office building was provisionally accepted end September 2018 by the European Parliament. The provisional acceptance represents the start of the 21-years usufruct period.

This building was constructed tailor-made according to the specifications of the European Parliament to realize a training center at walking distance of the Parliament.

The European Parliament currently conducts fitting out works in order to have the building operational in the spring of 2019.

Grand Duchy of Luxembourg

SHOPPING CENTER POMMERLOCH

For the shopping center Pommerloch located in the North of the Grand Duchy of Luxembourg, nearby the Belgian border, the works for the new parking (Bastogne entrance) will start on 7 January 2019.

Furthermore, some extensions are built for current tenants (total of 240 m²), that will be finalized mid-December 2018.

SHOPPING CENTER SCHMIEDE

As already mentioned in the half-year financial report 2018, the revamping and renovation of the Knauf shopping center Schmiede started in September. The renovation of the entrances to the parking progress as scheduled and will be finalized mid-December 2018.

The profound renovation works will subsequently start in the course of the first quarter of 2019, including an extension of 8,000 m² in order to offer more catering opportunities, shops and space for events. In the meanwhile, the urban permit for these renovation works has been granted.

Leases

Evolution of occupancy rate

The occupancy rate has slightly increased from 94.44% on 30 June 2018 to 94.86% on 30 September 2018.

Leases

BELGIUM

For the **Riverside Business Park** in Anderlecht, a couple of important new rental contracts were concluded. Hence, the occupancy rate of this park increased more than 5% compared to the situation on 30 June 2018.

The **Crescent business center** with co-working space **De Mot** in Malines remains a success story. The occupancy rate increased again in the course of Q3 2018 and progresses from 86.4% on 30/06/2018 to 87.22% following the conclusion of new services agreements. A nearly full occupancy is expected in Q4 2018, as at present a number of contract negotiations are ongoing.

The new-built project **Treesquare** in the CBD of Brussels, delivered earlier this year, is 69% leased on 30 September 2018. Advanced negotiations with a number of potential tenants are ongoing, which could result in the occupancy exceeding 90% by year-end 2018.

For **Tour & Taxis Royal Depot**, the occupancy rate remains at a high level, thanks to a number of renegotiations and extensions that have been concluded.

GRAND DUCHY OF LUXEMBOURG

For the building located Rue Guillaume J. Kroll in the **Cloche d'Or** district, which current tenant is leaving the building end December 2018, a new rental contract was concluded with Mazars Luxembourg SA for a fixed 9-year term, starting on 1 May 2019. This rental contract relates to 2,200 m² of office space and 69 parking spaces, and also comprises an option to rent the remaining office space (approximately 1,400 m²). After the departure of the current tenant, renovation works to the façade and the restaurant are scheduled, besides the refurbishment of the outdoor space.

Shopping center Pommerloch in the North of Luxembourg is still very appreciated by national and international retailers, with the opening of four new stores (Cecil, Post shop, Okaïdi, Tendances). The shopping center keeps on attracting new brands and its occupancy rate remains high.

AUSTRIA

The last units of the extension of over 1,000 m² van Frun® Park Asten were opened in the meantime. The occupancy rate of this successful retail park remains 100%. The footfall has once again risen by 8% compared to the same period last year.

Corporate Governance

Change in composition of executive committee

End November 2018, Sven Janssens (COO) leaves the company. Consequently, the executive committee will consist of 2 persons as of 1 December 2018:

- Michel Van Geyte, CEO, and
- Tim Rens, CFO.

Miscellaneous

EPRA Gold Award for Annual financial report 2017



For the 6th time in a row, Leasinvest Real Estate has been granted an EPRA Gold Award for its Annual financial report 2017. The award is granted to listed real estate companies that follow the EPRA Best Practices Recommendations, in view of improving transparency and comparability of data.

2. Key figures

Key figures real estate portfolio (1)	30/09/2018	31/12/2017
Fair value real estate portfolio (€ 1,000) (2)	925 683	902 994
Fair value investment properties, incl. participation Retail Estates (€ 1,000) (2)	1 013 803	976 338
Investment value investment properties (€ 1,000) (3)	944 420	921 141
Rental yield based on fair value (4) (5)	6.58%	6.44%
Rental yield based on investment value (4) (5)	6.45%	6.32%
Occupancy rate (5) (6)	94.86%	94.80%
Average duration of leases (years)	4.53	4.74

(1) The real estate portfolio comprises the buildings in operation, the development projects, the assets held for sale, as well as the buildings presented as financial leasing under IFRS.

(2) Fair value: the investment value as defined by an independent real estate expert and of which the transfer rights have been deducted. The fair value is the accounting value under IFRS. The fair value of Retail Estates has been defined based on the share price on 30/09/2018.

(3) The investment value is the value as defined by an independent real estate expert and of which the transfer rights have not yet been deducted.

(4) Fair value and investment value estimated by real estate experts Cushman & Wakefield, de Crombrugghe en Partners and Stadim (BeLux) and Oerag (Austria).

(5) For the calculation of the rental yield and the occupancy rate only the buildings in operation are taken into account, excluding the assets held for sale and the development projects.

(6) The occupancy rate has been calculated based on the estimated rental value.

Key figures balance sheet	30/09/2018	31/12/2017
Net asset value group share (€ 1,000)	387 494	382 206
Number of issued shares	4 938 870	4 938 870
Net asset value group share per share	78.5	77.4
Net asset value group share per share based on investment value	82.3	81.1
Net asset value group share per share EPRA	84.5	84.0
Total assets (€ 1,000)	1 042 214	999 293
Financial debt	594 550	540 440
Financial debt ratio (in accordance with RD 13/07/2014)	58.66%	57.14%
Average duration credit lines (years)	2.91	3.34
Average funding cost (excl. fair value changes financial instruments)	2.69%	2.99%
Average duration hedges (years)	4.93	5.15

The figures per share mentioned have been calculated based on the number of shares before the capital increase, as it took place on 4 October 2018, i.e. after the closing of the third quarter.

For more information we refer to chapter '4. Important events after the closing of the third quarter 2018'.

Key figures income statement	30/09/2018	30/09/2017
Rental income (€ 1,000)	41 923	42 107
Net rental result per share	8.49	8.53
EPRA Earnings* (1)	25 102	22 019
EPRA Earnings* per share (1)	5.08	4.46
Net result group share (€ 1,000)	27 217	29 666
Net result group share per share	5.51	6.01
Comprehensive income group share (€ 1,000)	29 983	41 380
Comprehensive income group share per share	6.07	8.38

(1) EPRA Earnings*, previously the net current result, consists of the net result excluding the portfolio result* and the changes in fair value of the ineffective hedges.

EPRA performance measures	30/09/2018	30/09/2017
EPRA Earnings* (in € per share) (1)	5.08	4.46
EPRA NAV* (in € per share) (2)	84.50	82.84
EPRA NNNAV* (in € per share) (3)	78.46	74.50
EPRA Net Initial Yield* (in %) (4)	5.45%	5.28%
EPRA Topped up Net Initial Yield* (in %) (5)	5.43%	5.32%
EPRA Vacancy* (in %) (6)	5.13%	6.69%
EPRA Cost ratio* (incl. direct vacancy costs) (in %) (7)	23.87%	26.40%
EPRA Cost ratio* (excl. direct vacancy costs) (in %) (7)	22.02%	23.37%

- (1) The EPRA Earnings*, previously net current result, consists of the net result excluding the portfolio result* and the changes in fair value of the ineffective hedges.
- (2) EPRA Net Asset Value* (NAV) consists of the adjusted Net Asset Value*, excluding certain elements that do not fit within a financial model of long-term real estate investments; see also www.epra.com.
- (3) EPRA NNNAV* (triple Net Asset Value*); consists of the EPRA NAV*, adjusted to take into account the fair value of the financial instruments, the debts and the deferred taxes; see also www.epra.com.
- (4) EPRA Net Initial Yield* comprises the annualized gross rental income based on the current rents at the closing date of the financial statements, excluding the property charges, divided by the market value of the portfolio, increased by the estimated transfer rights and costs for hypothetical disposal of investment properties; see also www.epra.com.
- (5) EPRA Topped up Net Initial Yield* corrects the EPRA Net Initial Yield* with regard to the ending of gratuities and other rental incentives granted; see also www.epra.com.
- (6) EPRA Vacancy* is calculated on the basis of the Estimated Rental Value (ERV) of vacant surfaces divided by the ERV of the total portfolio; see also www.epra.com.
- (7) EPRA Cost ratio* consists of the relation of the operating and general charges versus the gross rental income (including and excluding direct vacancy costs); see also www.epra.com.

3. Consolidated results period 01/01/2018-30/09/2018

The **EPRA earnings*** have substantially risen and amount end September 2018 to € 25.1 million (€ 5.08 per share) compared to € 22.0 million (€ 4.46 per share) end September 2017.

The **rental income** slightly decreased compared to the first 9 months of 2017: € 41.9 million per Q3 2018 vs € 42.1 million per Q3 2017. The decrease in rental income by the sale of different logistics buildings and the Swiss portfolio in 2017 is compensated to a large extent by the rental income from the newly acquired buildings in Austria and Luxembourg in the course of that same year. Like-for-like, the rental income has progressed (+ € 0.8 million or 2.79%).

The **gross rental yields** increased in comparison with end 2017 and stand at 6.58% (6.44% end 2017) based on the fair value and at 6.45% (6.32% end 2017) based on the investment value. The occupancy rate slightly increased from 94.80% end 2017 to 94.86% on 30/09/2018, mainly following the reclassification of the building Montoyer 63 (100% occupied) from “projects” to “leased buildings”.

The **property charges** decreased (- € 1.1 million) from - € 7.3 million per 30/09/2017 to - € 6.2 million per 30/09/2018, mainly because of lower technical costs (- € 0.7 million) and lower vacancy costs (- € 0.5 million), partially compensated by higher management costs (+ € 0.2 million). The management costs are calculated in function of the size of the real estate portfolio, they increased per 30/09/2018 compared to 30/09/2017. The **general corporate charges** remained nearly unchanged in comparison with 30/09/2017. The **operating margin** (operating result before the portfolio result/rental income) rises from 73.6% per 30/09/2017 to 76.7% per 30/09/2018.

The **changes in fair value of the investment properties** on 30/09/2018 amount to - € 90 K (30/09/2017: € 6.3 million) (or - € 6.4 million). Capital gains were recorded a/o on Montoyer 63, Frun Park Asten and Boomerang Strassen. On the other hand, there were capital losses on a/o Riverside Business Park.

The **financial result** amounts to € - 4.3 million on 30/09/2018 in comparison with € -5.9 million on 30/09/2017. The net interest charges dropped by € 1.2 million despite a higher volume of drawn credits compared to 30/09/2017 following the recent restructuring in the derivatives portfolio, in combination with lower margins on credits. Consequently, the average funding cost further decreased to 2.69% (2.99% year-end 2017).

The financial income increased by € 1.1 million on 30/09/2018 because of the higher dividend received from Retail Estates (+ € 1.0 million).

The changes in fair value of financial assets and liabilities (€ 2.2 million) comprise for the first time the revaluation of the participation in Retail Estates (€ 1.9 million). Till 2017 it was indeed revaluated directly in shareholders' equity (IFRS 9 in force since 1/1/2018). The revaluation of the

derivatives in the income statement amounts to € 0.3 million per 30/09/2018 vs € 2.3 million per 30/09/2017.

The corporate taxes remain nearly unchanged (€ 0.4 million).

The **net result** per 30/09/2018 amounts to € 27.2 million compared to € 29.7 million on 30/09/2017. In terms of net result per share this results in € 5.51 per share on 30/09/2018 compared to € 6.01 on 30/09/2017.

The changes in the effective part of the fair value of the authorized hedges were positive for an amount of € 2.7 million, mainly because of the interest curve being on the rise again.

At the end of the third quarter of the financial year 2018, **shareholders' equity** group share (based on the fair value of the investment properties) amounts to € 387.5 million (year-end 2017 € 382.2 million).

The **net asset value per share** excluding the influence of the fair value adjustments on financial instruments (EPRA NAV) amounts to € 84.5 end September 2018 in comparison with € 84.0 end 2017.

At the end of September 2018, the net asset value including the impact of the fair value adjustments on financial instruments (IAS 39) amounted to € 78.5 per share (31/12/17: € 77.4). The closing price of the Leasinvest Real Estate share on 30 September 2018 was € 89.80.

At the end of September 2018, the **debt ratio** increased to 58.66% in comparison with 57.14% end 2017. This is however outdated, as the capital increase of 4 October 2018 results in a decrease of ca. 7 percent points.

4. Management of financial resources

In the course of the third quarter of 2018, 2 credit facilities of € 15 million each were extended for respectively 5 and 7 years. In combination with the successful capital increase at the beginning of October 2018, the company keeps sufficient headroom for realizing further investments. Besides this, a number of restructurings took place in the existing derivatives portfolio in the third quarter. The transactions of earlier this year now lead to a lower average funding cost, this trend continuing in the fourth quarter of 2018, as a number of instruments have a forward start in the course of that last quarter.

5. Important events after the closing of the third quarter of 2018

Capital increase of € 83,960,790 fully subscribed

On 19/09/2018 the manager of Leasinvest Real Estate launched a capital increase in cash, within the framework of the authorized capital, with irreducible allocation right, for an amount of € 83,960,790 (including issue premium), by means of a public offering of 987,774 new shares at € 85.00 (ratio of 1 new share for 5 irreducible allocation rights). Consequently, the total number of shares amounts to 5,926,644 since 4/10/2018 - listing date of the new shares on the regulated market of Euronext Brussels - in comparison with 4,938,870 previously.

The subscription period ran from 20 September 2018 through 1 October 2018, and was fully subscribed after the sale of the scrips.

The net proceeds of the capital increase will be used to further support the dynamic asset management strategy, specific to the company: a strategy of repositioning the portfolio, re-dynamizing certain buildings and acquiring and transferring buildings when certain opportunities present themselves, and in general creating added value in the portfolio.

Moreover, these net proceeds, in combination with the increased borrowing capacity following the increase in the company's shareholders' equity, allow the company to fund its further growth, to decrease the debt ratio and to strengthen the balance sheet structure.

6. Outlook financial year 2018

As already mentioned in the transaction note in the scope of the capital increase, the company expects the EPRA earnings per share to remain at least stable compared to last year. Except for extraordinary and unexpected events, this should result in the possibility to maintain the dividend at least at the same level of € 5.00 per share.

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On LEASINVEST REAL ESTATE SCA

Public BE-REIT (SIR/GVV) Leasinvest Real Estate SCA invests in high quality and well-located retail buildings and offices in the Grand Duchy of Luxembourg, Belgium and Austria.

At present, the total fair value of the directly held real estate portfolio of Leasinvest amounts to € 926 million, spread across the Grand Duchy of Luxembourg (52%), Belgium (37%) and Austria (11%).

Moreover, Leasinvest is one of the most important real estate investors in Luxembourg.

The public BE-REIT is listed on Euronext Brussels and has a market capitalization of € 538 million (value on 16 November 2018).

ANNEX 1:

Reconciliation tables EPRA APM per 30 September 2018

EPRA earnings

EPRA earnings (€ 1 000)	30/09/2018	30/09/2017
Net Result – Group share as mentioned in the financial statements	27 217	29 666
Net Result per share - Group share as mentioned in the financial statements (in €)	5.51	6.01
Adjustments to calculate the EPRA Earnings	-2 115	-7 647
To exclude:		
(i) Changes in fair value of investment properties and assets held for sale	91	-6 332
(ii) Result on the sale of investment properties	0	1 330
(vi) Changes in fair value of financial instruments	-2 206	-2 645
EPRA Earnings	25 102	22 019
Number of registered shares on 30.09.2018	4 938 870	4 938 870
EPRA Earnings per share (in €)	5.08	4.46

EPRA NAV

EPRA NAV (€ 1 000)	30/09/2018	31/12/2017
NAV according to the financial statements	387 494	382 206
NAV per share according to the financial statements (in €)	78.5	77.4
To exclude		
(i) Fair value of the financial instruments	29 851	32 630
EPRA NAV	417 345	414 836
Number of registered shares on 30.09.2018	4 938 870	4 938 870
EPRA NAV per share (in €)	84.5	84.0

EPRA Triple Net Asset Value

EPRA Triple Net Asset Value (€ 1 000)	30/09/2018	31/12/2017
EPRA NAV	417 345	414 836
Adjustments:		
(i) Fair value of the financial instruments	-29 851	-32 630
(ii) Revaluation of debts at FV	-2 073	-1 245
EPRA NNNAV	385 421	380 961
Number of registered shares on 30.09.2018	4 938 870	4 938 870
EPRA NNNAV per share (in €)	78.0	77.1

EPRA NIY & EPRA Topped up NIY

EPRA Net Initial Yield (NIY) and Topped up Net Initial Yield (topped up NIY) (€ 1 000)		30/09/2018	31/12/2017
Investment properties and assets held for sale		925 683	902 994
To exclude:			
Development projects		-	-54 400
Real estate available for lease		925 683	848 594
Impact FV of estimated transfer rights and costs from hypothetical disposal of investment properties		-	-518
Estimated transfer rights and costs resulting from hypothetical disposal of investment properties		18 737	7 598
Investment value of properties available for lease	B	944 420	855 674
Annualized gross rental income		60 939	56 892
Annualized property charges		-9 429	-12 253
Annualized net rental income	A	51 510	44 639
Gratuities expiring within 12 months and other lease incentives		-222	293
Annualized and adjusted net rental income	C	51 288	44 932
EPRA NIY	A/B	5.45%	5.22%
EPRA Topped up NIY	C/B	5.43%	5.25%

EPRA Vacancy on 30/09/2018

EPRA Vacancy (€ 1 000)		30/09/2018			
		Offices	Logistics	Retail	Total
Rental surface (in m ²)		162 248	107 331	185 887	455 466
Estimated Rental Value of vacant spaces	A	2.18	0.23	0.72	3.13
ERV of total portfolio	B	27.72	4.19	29.05	60.96
EPRA Vacancy	A/B	7.86%	5.49%	2.48%	5.13%

EPRA Vacancy on 31/12/2017

EPRA Vacancy (€ 1 000)		31/12/2017			
		Offices	Logistics	Retail	Total
Rental surface (in m ²)		163 581	132 831	188 733	485 145
Estimated Rental Value of vacant spaces	A	1.90	0.26	0.53	2.69
ERV of total portfolio	B	24.03	4.13	23.57	51.73
EPRA Vacancy	A/B	7.91%	6.30%	2.25%	5.20%

EPRA cost ratio

EPRA cost ratio (€ 1 000)		30/09/2018	30/09/2017
Other rental-related income and expenses		-1 490	-1 947
Property charges		-6 354	-7 255
General corporate overhead		-2 122	-2 040
Other operating charges and income		-43	124
EPRA costs including rental vacancy costs	A	-10 009	-11 118
Direct costs of rental vacancy		777	1 278
EPRA costs excluding rental vacancy costs	B	-9 232	-9 840
Rental income	C	41 923	42 107
EPRA Cost ratio (including direct vacancy)	A/C	-23.87%	-26.40%
EPRA Cost ratio (excluding direct vacancy)	B/C	-22.02%	-23.37%

ANNEX 2:

Reconciliation tables other APMs per 30 September 2018

Result on the portfolio

Result on the portfolio (€ 1 000)	30/09/2018	30/09/2017
Result on sale of investment properties	-	-1 330
Changes in fair value of investment properties	229	6.332
Latent taxes on portfolio result	-320	0
Result on the Portfolio	-91	5 002

Net result – group share (amount per share)

Net result – group share (amount per share)	30/09/2018	30/09/2017
Net Result - group share (€ 1000)	27 217	29 666
Number of registered shares in circulation	4 938 870	4 938 870
Net Result - group share per share	5.51	6.01

Net Asset value based on fair value (amount per share)

Net Asset value based on fair value (amount per share)	30/09/2018	31/12/2017
Shareholders' equity attributable to the shareholders of the parent company (€ 1000)	387 494	382 206
Number of registered shares in circulation	4 938 870	4 938 870
Net Asset Value (FV) group share per share	78.5	77.4

Net Asset Value based on investment value (amount per share)

Net Asset Value based on investment value (amount per share)	30/09/2018	31/12/2017
Shareholders' equity attributable to the shareholders of the parent company (€ 1000)	387 494	382 206
Investment value of the investment properties per 31/12 (€ 1000)	944 420	921 141
Fair value of the investment properties per 31/12 (€ 1000)	925 683	902 994
Difference Investment value – Fair value per 31/12 (€ 1000)	18 737	18 147
TOTAL	406 231	400 353
Number of registered shares in circulation	4 938 870	4 938 870
Net Asset Value (IV) group share per share	82.3	81.1

Changes in gross rental income at constant portfolio (like-for-like)

Changes in gross rental income at constant portfolio (like-for-like)	30/09/18 vs. 30/09/17	30/09/17 vs. 30/09/16
Gross rental income at the end of the previous reporting period (€ 1000)	41 753	41 502
Changes to be excluded	-816	1 846
- Changes following acquisitions	5 050	2 090
- Changes following divestments	-5 866	-244
Gross rental income at closing date reporting period (€ 1000)	41 714	41 753
Change like for like (€ 1000)	777	-1 595
Change like for like (%)	1.9%	-3.8%

Average funding cost in %

Average funding cost in %	30/09/2018	31/12/2017
Interest charges on an annual basis (€ 1000)	-14 291	-14 905
Commitment fees on an annual basis (€ 1000)	-1 067	-1 127
Interest paid incl. commitment fees on an annual basis (€ 1000)	-15 358	-16 032
Weighted average withdrawn debt (€ 1000)	571 756	536 071
Average funding cost in %	2.69%	2.99%

Comprehensive income – Group share (amount per share)

Comprehensive income – Group share (amount per share)	30/09/2018	30/09/2017
Net result - Group share (€ 1000)	27 217	29.666
Other elements of comprehensive income	2 766	11.714
Changes in the effective part of the fair value of authorized cash flow hedges according to IFRS	2 766	9.949
Changes in the effective part of the fair value of financial assets available for sale	0	1.413
Changes in the reserve for treasury shares	0	281
Other	0	71
Comprehensive income – Group share	29 983	41.380
Number of registered shares in circulation	4 938 870	4.938.870
Comprehensive income – Group share per share	6.07	8.38