ID	Company	Stock Code (ticker)	Country
	499 Goodman Group	GMG	Australia
	503 Realty Income	0	United States of America
	506 VICI Properties Inc.	VICI	United States of America
	517 GPT Group	GPT	Australia
	534 UDR	UDR US Equity	United States of America
	604 NEXT DC	NXT AU	Australia

602 Gecina SA	GFC FP	France
002 Geema Sr	GI CI I	Trance
609 Nomura Real Estate Holdings	3231 JP	Japan
602 Kimaa Baaltu	ZINA	Australia
603 Kimco Realty	KIM	Australia
610 Mitsui Fudosan	8801 JP	Japan
611 Helios Towers	HTWS.LN	United States of America

614 Xenia F	lotels	XHR	United States of America
624 Sumito	mo Realty	8830 JP	Japan
623 Sumito	mo Forestry	1911 JP	Japan
622 Iida Gr	oup	3291 JP	Japan
617 Goodm	nan Group	GMG AU	Australia
625 Home(Co	HMC AU	Australia
621 Hoshin	o Resort REIT	3287 JP	Japan
765 Advanc	ce Residence Investment	3269 JP	Japan
766 Tokyu	REIT	8957 JP	Japan

675 Charter Hall Group	СНС	Australia	

676 Charter Hall Retail REIT	CQR	Australia
767 Mitsubishi Estate Logistics	3481 JP	Japan
707 Wittsubisin Estate Logistics	3401 11	Japan
711 HMC Capital	HMC AU	Australia
709 Goodman Group	GMG	Australia
705 Goodinan Group	31113	/ tasti alia

708 NextDC	NXT AU	Australia	
710 Dexus	DXS AU	Australia	
768 Daiwa House Industry	1925 JP	Japan	
769 Mitsubishi Estate	8802 JP	Japan	
770 Hoshino Resorts REIT	3287 JP	Japan	

MAM Teams Involved	E issues discussed	S issues discussed	G issues discussed
Global Listed Real Estate;	Yes	No	Yes
,			
Global Listed Real Estate;	Yes	Yes	Yes
Global Listed Real Estate;	Yes	No	Yes
Global Listed Real Estate;	Yes	Yes	Yes
Global Listed Real Estate;	Yes	Yes	No
,			
Global Listed Real Estate;	Yes	Yes	Yes

Global Listed Real Estate;	Yes	Yes	Yes
Global Listed Real Estate;	Yes	No	Yes
Global Listed Real Estate;	Yes	Yes	Yes
Global Listed Real Estate;	Yes	No	Yes
,			
Global Listed Real Estate;	Yes	Yes	Yes

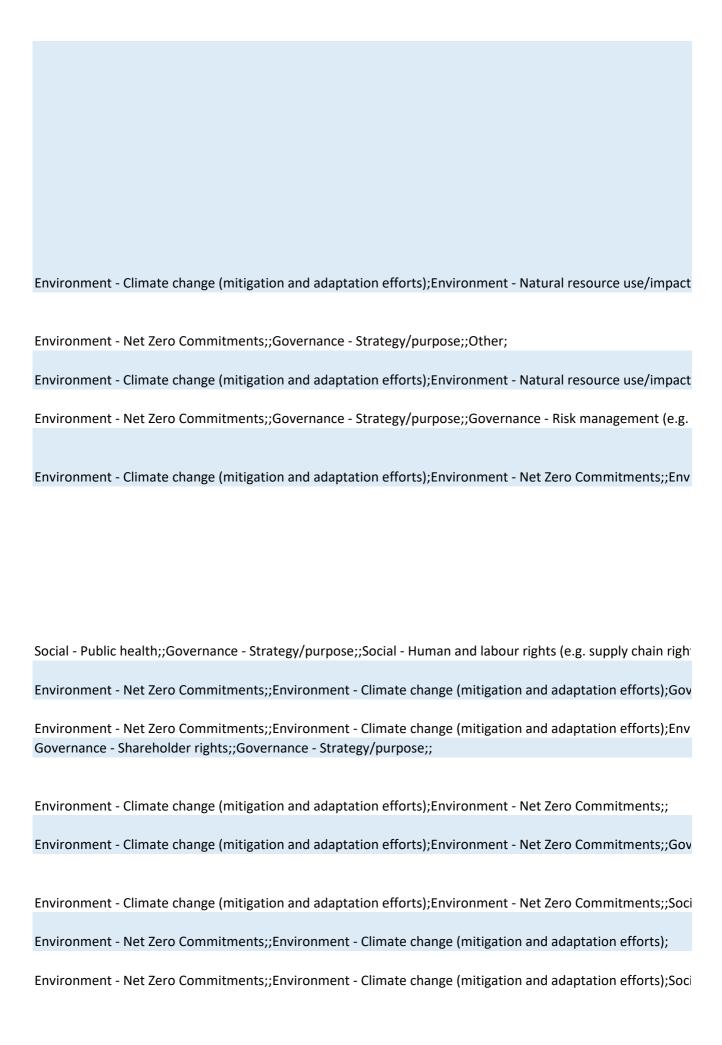
Global Listed Real Estate;	No	Yes	Yes
Global Listed Real Estate;	Yes	No	Yes
Global Listed Real Estate;	Yes	No	Yes
Global Listed Real Estate;	No	No	Yes
Global Listed Real Estate;	Yes	No	No
Global Listed Real Estate;	Yes	No	Yes
Global Listed Real Estate;	Yes	Yes	No
Global Listed Real Estate;	Yes	No	No
Global Listed Real Estate;	Yes	Yes	Yes

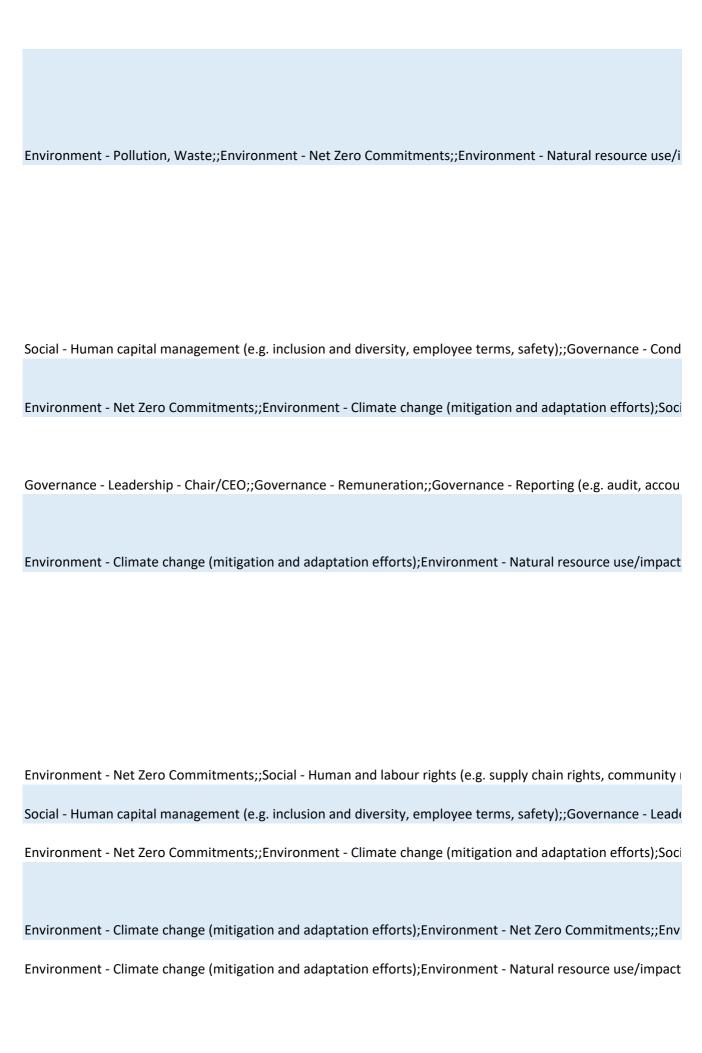
Global Listed Real Estate;	Yes	Yes	Yes

Global Listed Real Estate;	No	Yes	Yes
Global Listed Real Estate;	Yes	Yes	Yes
Global Listed Real Estate;	No	No	Yes
Global Listed Real Estate;	Yes	No	Yes

Global Listed Real Estate;	Yes	Yes	Yes
Global Listed Real Estate;	No	Yes	Yes
Global Listed Real Estate;	Yes	Yes	Yes
,			
Global Listed Real Estate;	Voc	No	Yes
Giobai Listeu Real Estate,	res	INU	res
Global Listed Real Estate;	Yes	Yes	No

ESG issues discussed (please check all that apply)
Environment - Climate change (mitigation and adaptation efforts);Environment - Net Zero Commitments;;Env
Governance - Capital allocation;;Governance - Strategy/purpose;;Environment - Pollution, Waste;;Environment - Natural resource use/impact (e.g. water, biodiversity);;Social - Public health;;
Environment - Natural resource use/impact (e.g. water, biodiversity);;Environment - Net Zero Commitments;;Governance - Leadership - Chair/CEO;;
Environment - Net Zero Commitments;;Social - Human capital management (e.g. inclusion and diversity, empl
Environment - Climate change (mitigation and adaptation efforts); Environment - Net Zero Commitments;; Social - Human capital management (e.g. inclusion and diversity, employee terms, safety);; Environment - Natural resource use/impact (e.g. water, biodiversity);;
Social - Human and labour rights (e.g. supply chain rights, community relations);;Environment - Climate change





Call format	Names of Company Contacts
Can format	Names of Company Contacts
1x1	Greg Goodman, Nick Vrondas
Small Group	Sumit Roy, Jonathan Pong
1x1	David Kieske, Moira McCloskey, Erin Ferreri
1x1	Vickki McFadden, Tracey Horton
1x1	Joseph Fischer
1x1	Simon, Doug Flynn

Small Group	Benat Ortega, Nicolas Dutreuil, Samuel Henry-Diesbach
Small Group	Masayuki Ohmi
1x1	dbujnicki@kimcorealty.com; mtoscano@kimcorealty.com
Small Group	Atsuro Uchida
1x1	Tom Greenwood, Chris Baker-Sans, Manjit dhillon
1x1	Marcel Verbaas, Atish Shah, Amanda Bryant
Small Group	Norio Sumitomo
Small Group	Hiroshi Nishino
1x1	Greg Goodman, James Inwood
1x1	David Di Pilla, Misha Mohl
1x1	Kenji Akimoto
1x1	Isao Kudo
1x1	Yoshitaka Kimura

Large Group	Philip Cheetham
1x1	Philip Cheetham
1x1	Ken Takanashi
1x1	Chris Saxon, Misha Mohl
1x1	Greg Goodman, James Inwood
11	Douglas Then Simon Cuzaveki
1x1	Douglas Flynn, Simon Guzowski
1x1	Warwick Negus
1x1	Takeshi Kosokabe
Small Group	Toru Watanabe
1x1	Takahiro Kabuki

Positions of contacts
CEO (if congrate from Chair), CEO.
CEO (if separate from Chair);CFO;
CEO (if separate from Chair);Other;
CFO;Investor Relations;
Chair;Board Member;
Change and Member,
CFO;
Ci O,
Chair;Investor Relations;Sustainability;
,,



Investor Relations;
Investor Relations;
Investor Relations;Board Member;
Chair;Investor Relations;
CEO (if separate from Chair);Investor Relations;
elo (il separate from chair), investor relations,
Chair;Investor Relations;Sustainability;
Chair;
CFO;Investor Relations;
Ci O,investor nelations,
Investor Relations; Investor Relations;Other;

Discussion Summary	Outcome (If follow up is needed, please provide details)
Discussed Scope 2 vs. Scope 3 emissions. GMG coalescing around scope 2, view scope 3 as hard to measure /control. Also discussed remuneration, and move in LTI RSU calc from economic value of units (discounted/volatility adjusted) to using face value of GMG stock, which is more aligned to market practice.	Board has listened to market feedback and changed approach, which led to material reduction in management LTI
Discussed capital allocation for sizeable acquisition activity and pipeline, including the possibility of utilizing additional green bonds. Also discussed	Discussed investment strategy into new and existing verticals, including initial foray into vertical farming and the environmental and social benefits of this line of business. Also discussed investments in the consumer-centric medical vertical and the demand drivers leading to the attractiveness of this sector and the multiple benefits to consumers.
Discussed internal ESG initiatives and commitments from operators to ESG (ie. MGM's push to use solar panels and water conservation). Apollo (operator of Venetian) is required to hit significant ESG hurdles to appeal to their own investors. Getting VICI investor interest in Europe has been challenged, but remains an ongoing discussion. HXE consultant has been hired to help focus on ESG improvement for net lease	
companies specifically. Routine meeting with the Chair/Other Board	None
Member to discuss key topics affecting the business ahead of the company's AGM. Key topics include those selected in Q9 above as well as real estate market dynamics.	N/A - broadly comfortable with items discussed
	My A broadly confiortable with items discussed
In depth discussion with UDR with regards to their environmental & hiring policies. Particular note was made of a stalled solar project in California due to weakened economics as a result of the State government changing max reimbursement rates.	No outcome at present - UDR is lobbying the California State legislator to reverse the new policies as they make solar investments difficult to justify financially.
Discussion around board governance; net zero targets and how they plan to facilitate growth in south east Asia consistent with safety standards applicable in Australia	No outcome required

We spoke about how different tenants in their portfolio are demanding different ESG standards and reporting from their buildings. We also discussed the return on investment delivered from willing to pay high rents and therefore ironically improving their portfolio - particularly focused on E. We also discussed the strategy of the business and whether they should reduce the size of their portfolio and buy back shares which are trading at given uncertain credit markets and we agree with a discount.

The company is focused on ESG however they feel that the Paris market is not as willing to pay for higher standards as many other global cities. While the government pushes aggressively for corporates to have high standards, they themselves are not occupy some of the lower grade E buildings. On the Buyback idea, while they acknowledge the merit in theory they want to keep liquidity high this.

Various green building efforts. Shareholder return (dividend payout & share buy-back), capital management policy.

ongoing review

Discussed Kimco's ESG approach as a leader in the space for its ESG commitments GHG emissions, capital management policy, risk management in overseas business

No follow up required; team will continue to engage

Meeting with prospective company. As a African Tower company ESG is an important part of the investment thesis.

ongoing discussion

Continuing underwrite and following the company

Non-deal roadshow with current holding. Discussed hotels positioned relative to public health crisis's in San Francisco and Portland and the implications for demand. Company is not impacted by current union strikes seen around the united states. Asked many questions about the company's strategy and how it could change in the coming years.

None

GHG emissions. Capital management policy. Poison pill cancellation

Ongoing review

Zero Energy Home, capital management policy, risk management in US operation

Ongoing review Ongoing review

Discussion on move to Data Centres and what this their carbon footprint in line with commitments means from a carbon footprint perspective. Companies plans for net-zero targets, energy

No outcomes necessary. Goodman will manage made at a corporate level.

transition fund, growth strategy The company's target regarding net zero commitment, climate change

Capital management policy

na

Human resources management Net zero target and measures to achieve the Ongoing review

target

Ongoing discussion

Net zero target, community engagement, new CEO Ongoing discussions

Charter Hall hosted a Sustainability Briefing for CHC stakeholders, which included a presentation and Q&A session. The majority of the time was spent on "E" and the key strategic pillars behind CHC's holistic ESG Strategy.

Update ESG Score. No follow up needed at this stage.

Pre-AGM meeting with the Chair of CQR and IR. This is generally conducted on an annual basis to address any key items in the AGM or themes about the broader business. As CQR is an externally managed REIT, which has inherent conflicts of interest, the majority of the discussion was around the "G" and how Governance risks are managed in light of the external-management structure.

No follow up needed. Reinforced lower G score for CQR.

Net zero target, community engagement, executives' remuneration linked to share price performance

Spoke to the HMC Chair and IR about matters of remuneration ahead of the AGM and also the process of target setting and future provision of earnings guidance.

Spoke future strategy re Data Centers. Spoke about access to materials / power and how to manage power access in an environmentally friendly way.

Ongoing discussions

Company gave us comfort with process and committed to improving guidance setting and transparency moving forward.

no follow up required, GMG are well placed from an ESG perspective

We discussed the most recent remuneration proposal, which included a change to the LTI which would award 50% of the LTI under positive absolute TSR. The discussion centered around whether this was an adequate hurdle for management to meet. Consideration was taken for the relative pay of the executives compared to peer companies globally as well as how the LTI of peer companies have been structured.

CEO hiring process, strategic direction, required skillsets of executive team

Net zero target, diversity, particularly % of female

No follow up needed.

Continue to engage on required characteristics of next CEO

Net zero target, diversity, particularly % of female managers, share buybacks

Ongoing discussions

Ongoing discussions. The company will announce key amendments to its long-term business plan, including ESG and capital management plan, in May 2024

E related numerical targets, share buybacks Net zero target, employee & community

engagements

Ongoing discussions

Current Holding?
Yes
Yes
Yes

Yes

Yes

Yes
No
V
Yes
No
No
Yes
Vos
Yes
No
No
Yes
Yes
163
No
No Yes

Yes

Yes		

No

Yes

Yes

Yes

Yes

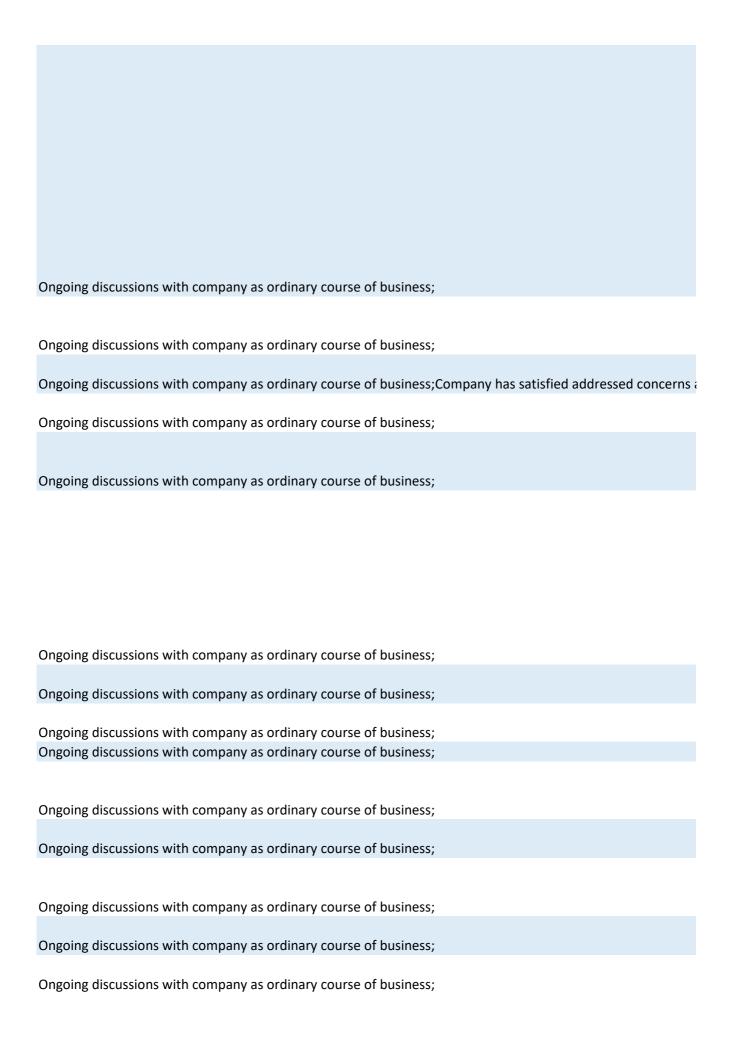
Yes

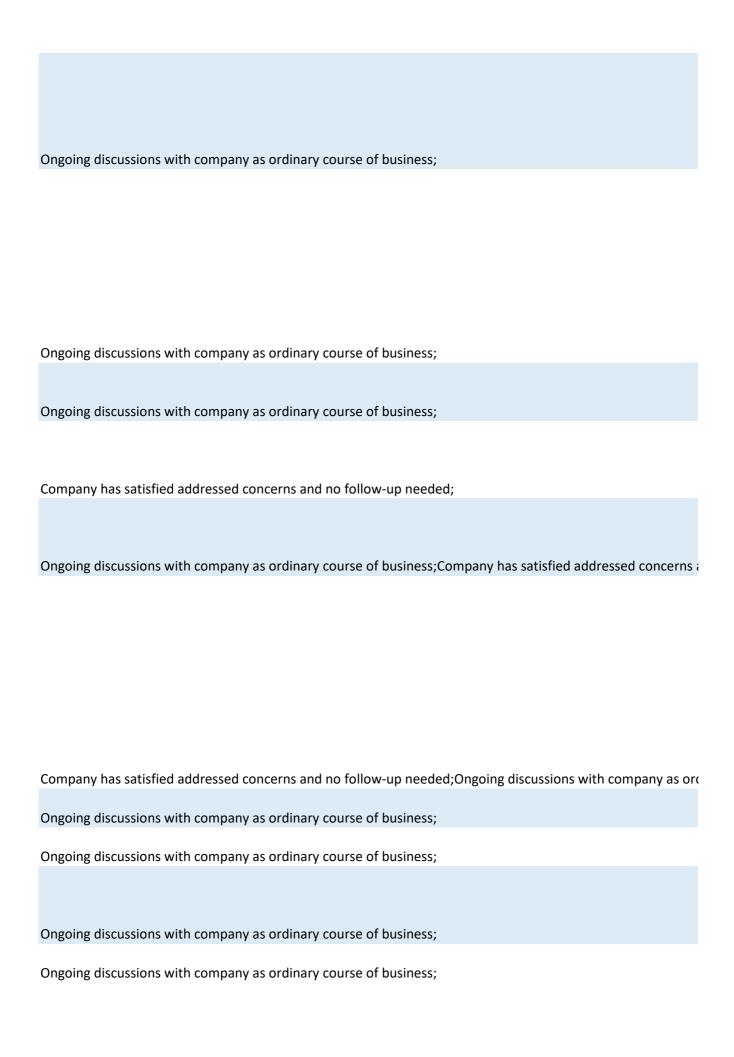
No

Yes

No

Current Engagement Status After Discussion
Ongoing discussions with company as ordinary course of business; Company has satisfied addressed concerns a
Ongoing discussions with company as ordinary course of business, company has substice addressed concerns to
Ongoing discussions with company as ordinary course of business;
Ongoing discussions with company as ordinary course of business;
Ongoing discussions with company as ordinary course of business;
Ongoing discussions with company as ordinary course of business;
Ongoing discussions with company as ordinary course of business;





and no follow-up needed;

and no follow-up needed;

. Classification: Confidential

and no follow-up needed;		
dinary course of business;		
,		