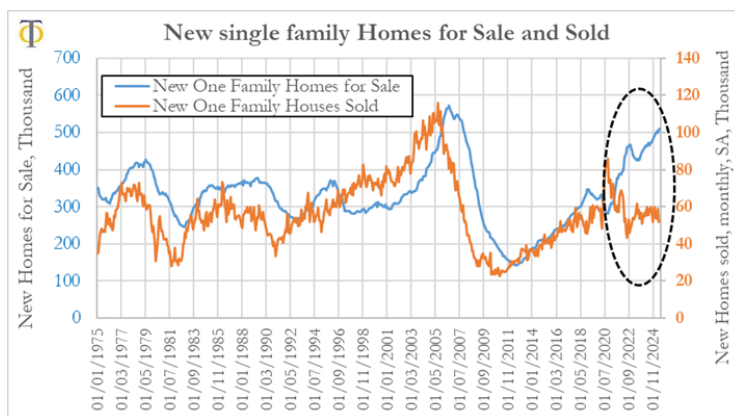


US Real Estate Package

2025-08-04

The emerging US Real Estate crisis



Key Highlights:

- US housing market on the verge of a full blown crisis.
- Led by multi-family projects
- Divergence between houses for sale and houses sold.
- 9.8 months' supply near 2006 peak.
- Expect rent disinflation in the months ahead.

Implications

- Risk of an economic recession by fall of 2025.
- Expect a risk-off environment.
- Rotation out of risky assets into safe assets.
- Stock markets are not discounting possibility of a recession.
- Risk management scenarios.

The package includes:

- New Tenant Rent analysis. Updated until end of July 2025
- New Residential Construction analysis. Updated until end of July 2025
- New Home Sales analysis. Updated until end of July 2025
- Executive presentation with links to continuously updated data dashboards
- Video where Ed Dowd and Carlos Alegria go through the executive presentation and provide their personal views.

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