



LEG Immobilien AG

11 March 2019

FY-2018 Results

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I. HIGHLIGHTS FY-2018

II. PORTFOLIO AND OPERATING PERFORMANCE

III. FINANCIAL PERFORMANCE

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Highlights FY-2018



Overall company development

- **Management changes** Lars von Lackum (CDO) appointed as new CEO (as at June 1), best mutual agreement with Thomas Hegel (becomes Senior Advisor);
Volker Wiegel appointed as new COO as at June 1
- **Disposal program** Portfolios with total volume c. 2,000 units in negotiation phase

Attractive rent momentum persists

- **In-place rent, l-f-l** €5.67/sqm (+3.0%; free financed units +3.9%)
- **EPRA-Vacancy, l-f-l** 3.3% (+/-0 bps YOY)
- **Maintenance/Capex** €29.4/sqm (+31.3% YOY)

Financials: FY targets reached; strong dividend growth

- **Net cold rent** €560.2m (+4.8% YOY from €534.7m)
- **Adjusted EBITDA** €405.2m (+5.1% YOY from €385.7m)
- **FFO I** €318.6m (+7.9% YOY from €295.3m), €5.04 per share (+7.9% YOY from €4.67)
- **Dividend (proposal)** €3.53 per share (up from €3.04 in FY-2017, +16.1% YOY)
- **EPRA-NAV (excl. goodwill)** €96.10 per share (up from €83.81 in FY-2017; +15.0% YOY)
- **Pro forma NAV** post conversion €93.40 per share (up from €80.90 in FY-2017; +15.4% YOY);
NAV after a simulated, executed conversion of the 2014/2021 convertible;
objective is to increase transparency with respect to potentially dilutive NAV effects

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Portfolio Overview

Positive rent development across all submarkets



Strong results on the basis of tailor-made management strategies



High-Growth Markets

	31.12.2018	Δ (YOY)
# of units	41,423	+1.0%
In-place rent (sqm), I-f-I	€6.36	+3.4%
EPRA-Vacancy, I-f-I	2.0%	+30 bps

Stable Markets

	31.12.2018	Δ (YOY)
# of units	48,965	+2.8%
In-place rent (sqm), I-f-I	€5.35	+2.8%
EPRA-Vacancy, I-f-I	3.0%	-20 bps

Higher-Yielding Markets

	31.12.2018	Δ (YOY)
# of units	41,731	+5.5%
In-place rent (sqm), I-f-I	€5.26	+2.9%
EPRA-Vacancy, I-f-I	5.7%	+/-0 bps

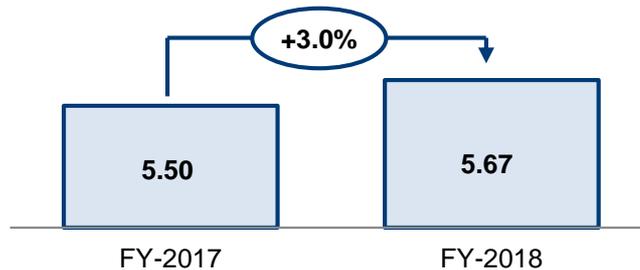
Total Portfolio

	31.12.2018	Δ (YOY)
# of units	133,969	+3.0%
In-place rent (sqm), I-f-I	€5.67	+3.0%
EPRA-Vacancy, I-f-I	3.3%	+/-0 bps

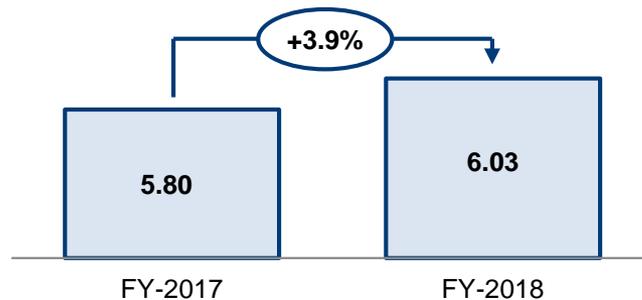
Rent Development

Sound underlying rent dynamics

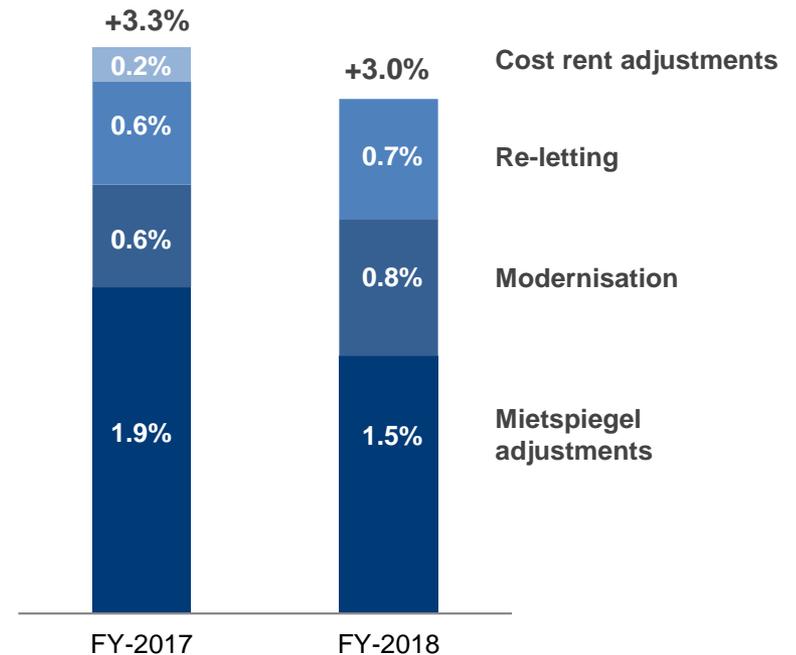
L-f-I residential rent (€/sqm/month)



L-f-I free financed rent (€/sqm/month)



Rent growth drivers



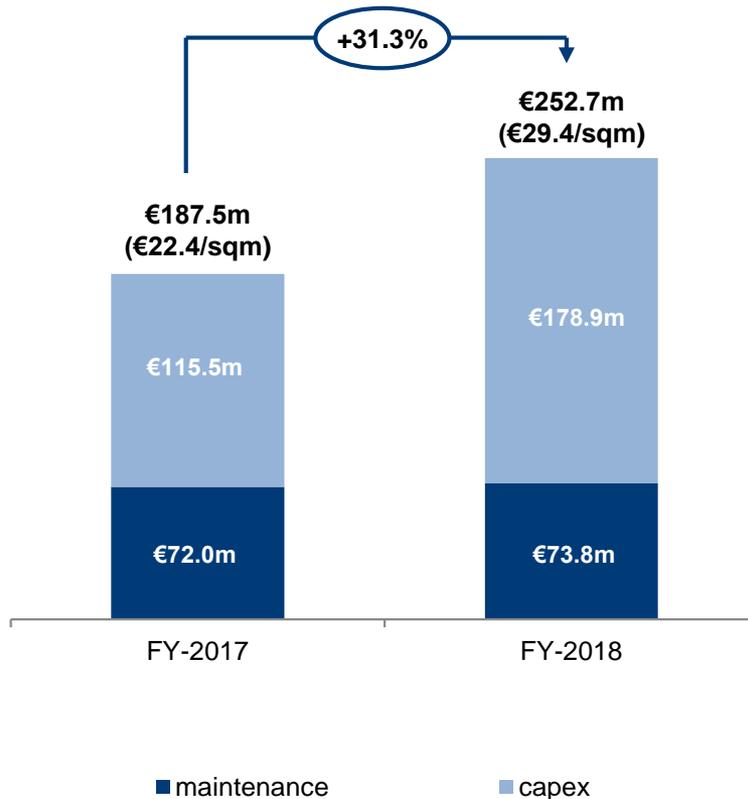
- Performance of free financed units demonstrates strong underlying fundamentals
- Rent restricted units: +0.4% year-on-year (like-for-like)
- High exposure to structural growth markets and respective commuter belts supports outperformance

- Well diversified mix of growth drivers (low execution risk)
- Growth not boosted by overspending (capex) though supported by modernization program
- Effects from capex are now partially included in the re-letting cluster

Capex & Maintenance

Lifting internal growth potential

Lifting growth potential while maintaining high capital efficiency



- Investments have **increased c.31%** year-over-year in line with increased value enhancing capex (29.4 €/sqm)
- **Enhanced capex program ongoing** with major investments in Dortmund, Monheim, Münster, Mönchengladbach and Cologne in 2018
- **Capex ratio** has increased from 61.6% in FY-2017 to **70.8%** in FY-2018
- **Outlook of 30-32 €/sqm in 2019**

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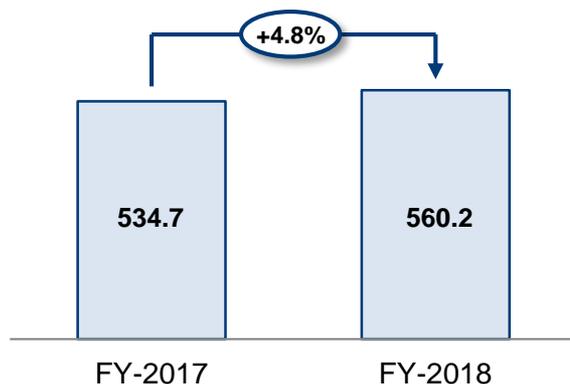
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Financial Highlights FY-2018

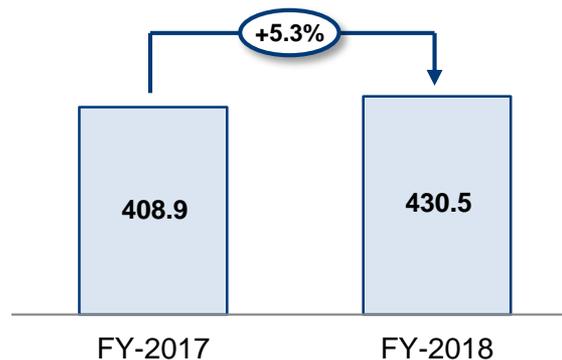
Margin expansion story is set to continue



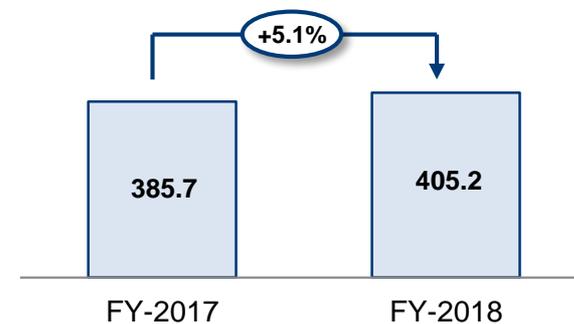
Net Cold Rent (€m)



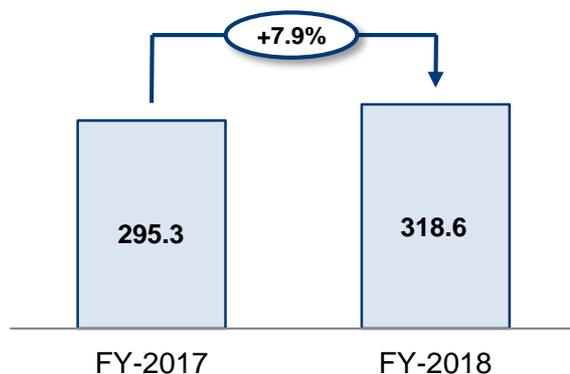
Adj. Net Rental and Lease Income (€m)



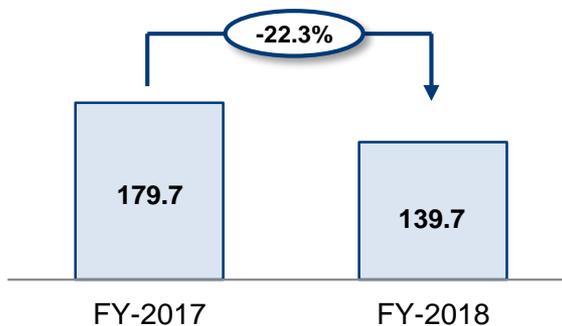
Adj. EBITDA (€m)



FFO I (€m)



Capex-Adj. FFO I / AFFO (€m)



Margin (%)

	FY-2017	FY-2018	Comment
Adj. NRI	76.5	76.9	Ongoing efficiency gains
Adj. EBITDA	72.1	72.3	See above + lower income "Others"
FFO I	55.2	56.9	See above + lower interests
AFFO	33.6	24.9	See above + higher growth capex

FFO Calculation

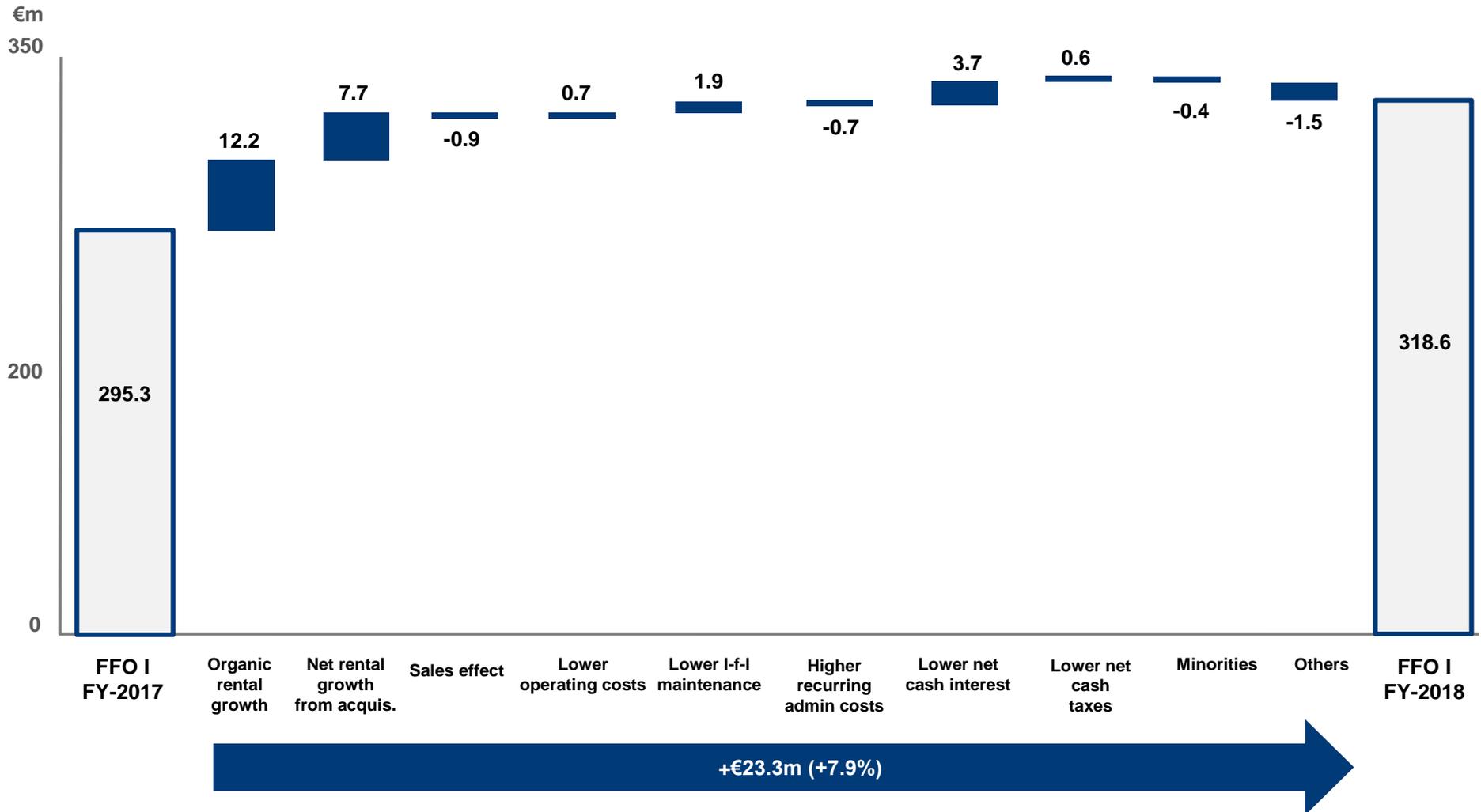
FY-2018



€ million	FY-2018	FY-2017	
Net cold rent	560.2	534.7	▪ +€25.5m/+4.8%
Profit from operating expenses	-4.5	-2.8	
Maintenance (externally-procured services)	-51.8	-51.2	
Staff costs	-60.3	-55.8	▪ Growth in staff costs mainly due to additional FTE's for crafts services and enhanced capex program
Allowances on rent receivables	-8.4	-7.2	
Other	-10.4	-12.2	
Non-recurring project costs (rental and lease)	5.8	3.4	
Recurring net rental and lease income	430.6	408.9	▪ Adj. NRI increased by +€21.7m YOY (+5.3%); rising cost inflation more than offset by efficiency gains
Recurring net income from other services	7.8	8.7	
Staff costs	-24.8	-22.2	
Non-staff operating costs	-18.4	-18.5	
Non-recurring project costs (admin.)	9.2	7.4	▪ Admin. Costs: moderate increase (YOY) despite wage inflation and additional regulatory requirements (below level of 2013)
Recurring administrative expenses	-34.0	-33.3	
Other income and expenses	0.8	1.4	
Adjusted EBITDA	405.2	385.7	▪ EBITDA increased by +€19.5m YOY (+5.1%)
Cash interest expenses and income	-77.2	-80.9	
Cash income taxes from rental and lease	-5.8	-6.4	
FFO I (including non-controlling interests)	322.2	298.4	▪ Lower interest costs (average costs of FY-2018: 1.72% vs. 1.88% in FY-2017) despite rising debt volume
Non-controlling interests	-3.6	-3.1	
FFO I (excluding non-controlling interests)	318.6	295.3	
FFO II (including disposal of investment property)	318.8	294.1	
Capex-adjusted FFO I (AFFO)	139.7	179.8	

FFO Bridge

FY-2018



Cash Effective Interest Expense

FY-2018



€ million	FY-2018	FY-2017	
Reported interest expense	109.3	152.3	
Interest expense related to loan amortisation	-14.0	-57.8	<ul style="list-style-type: none"> One-off refinancing effect of €41m in FY-2017 from refinancing of subsidised loans (loan amortisation)
Prepayment penalties / breakage costs	-13.5	-9.5	<ul style="list-style-type: none"> Release of swaps and fixed interest loans (refinancing)
Interest costs related to valuation of assets/liabilities	0.0	-0.4	
Leasing related interest expense	-0.8	-0.9	
Interest expenses related to changes in pension provisions	-2.4	-2.4	
Other interest expenses	-0.5	0.0	
Cash effective interest expense (gross)	78.1	81.3	
Cash effective interest income	0.8	0.4	
Cash effective interest expense (net)	77.2	80.9	<ul style="list-style-type: none"> Interest coverage improved further (5.3x up from 4.8x YOY)

EPRA-Net Asset Value

Reported values still below transaction prices; services as hidden gem



€ million	31.12.2018	31.12.2017
Equity (excl. minority interests)	4,757.6	4,087.4
Effect of exercising options, convertibles and other rights	553.9	559.2
NAV	5,311.5	4,646.6
Fair value measurement of derivative financial instruments	222.2	259.8
Deferred taxes ¹⁾	1,132.7	899.3
EPRA-NAV	6,666.4	5,805.7
Number of shares fully-diluted incl. convertible (m) ²⁾	68.824	68.644
EPRA-NAV per share in €	96.86	84.58
Goodwill resulting from synergies	52.7	52.7
Adjusted EPRA-NAV (excl. goodwill)	6,613.7	5,753.0
Adjusted EPRA-NAV per share in €	96.10	83.81
Effects from a simulated executed conversion	-185.7	-199.4
Pro forma NAV (excl. goodwill) post-conversion	6,428.0	5,553.6
Pro forma NAV post conversion per share in €	93.40	80.90

- €843m net profit
- -€192.1 dividends
- €19.3m others

Comment on pro forma NAV post conversion

- This figure incorporates a simulated, executed conversion of the 2014/2021 convertible with a put and a call option in 2019
- It is shown to further increase transparency with regard to potentially dilutive NAV effects

- Attractive rental yield of 5.5% (thereof free financed portfolio: 5.7%) and low value per sqm (€1,198) still reflect decent gap to recent portfolio transactions
- Value of services business not included in NAV
 - Scenario: additional value approx. €4.60-€6.90 per share (discount rate of 4.0%-6.0%)³⁾

¹⁾ And goodwill resulting from deferred taxes on EPRA-adjustments

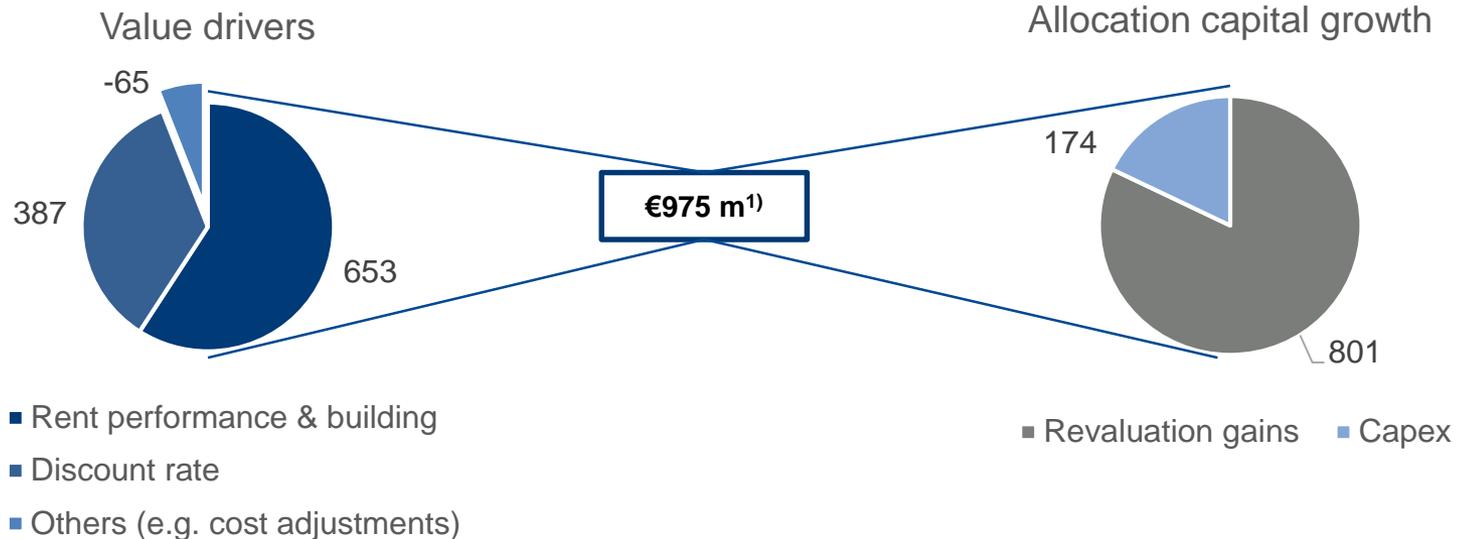
²⁾ Actual number of shares outstanding 63.1FY

³⁾ Assumption: expected 2019 FFO, growth rate of 0%

Portfolio Valuation FY-2018

Valuation uplifts driven by letting performance and yield compression

Breakdown revaluation gains (€ million)



- **Yield compression** (especially in Green and Purple markets) and broad-based strong letting performance drive portfolio values
- Visible **catch-up effects** with respect to multiple B-cities and commuter towns
- Adjustment of discount rate from 5.3% in FY-2017 to 5.2% (cap rate from 6.3% to 6.1%)

¹) Change in Gross Asset Value, I-f-I

Portfolio Valuation FY-2018



Broadbased valuation uplifts continue across market segments

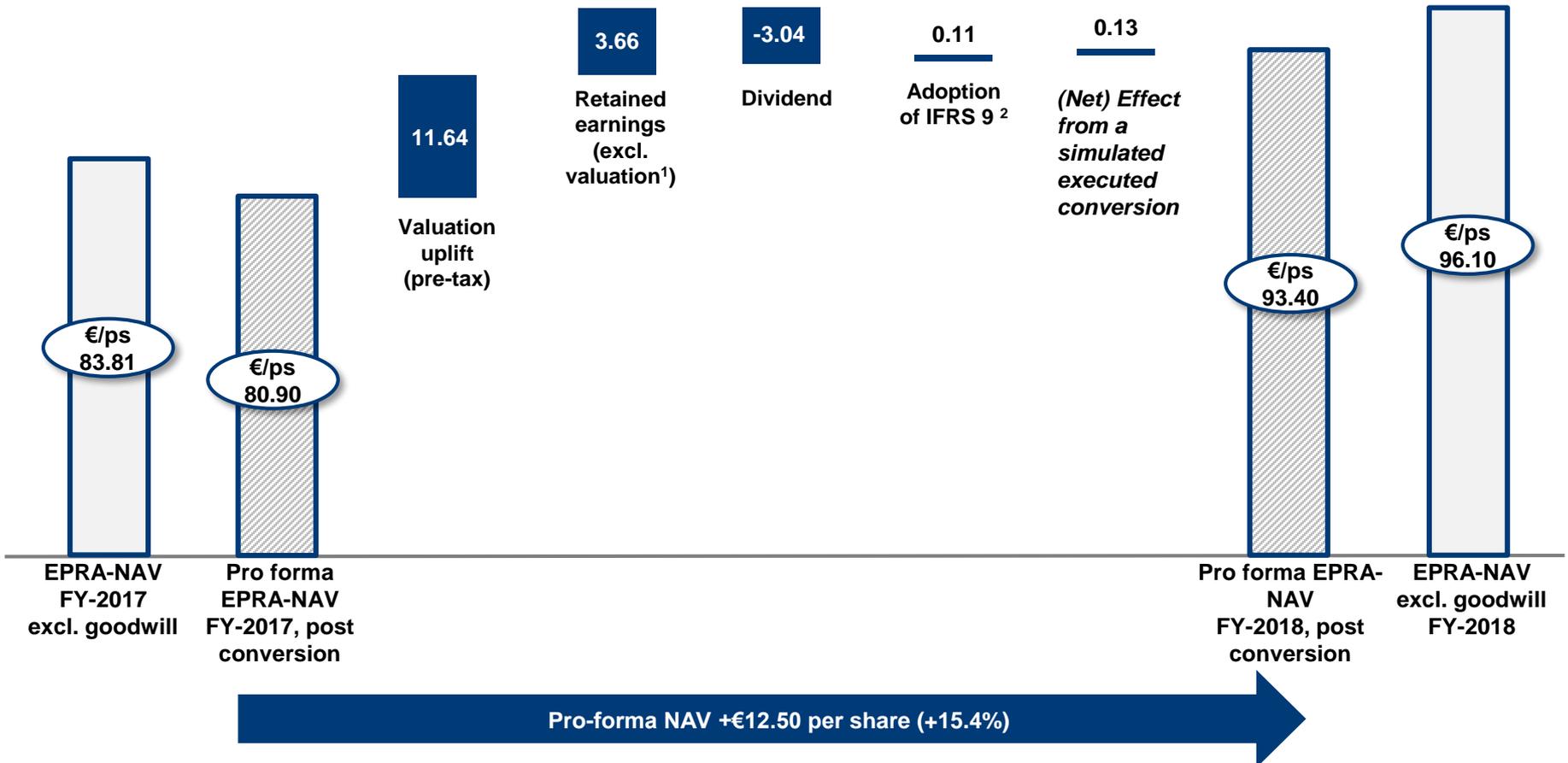
Valuation uplift by markets (l-f-l), including commercial and other assets

	Valuation uplift FY-18	Valuation uplift H2-18	Gross yield FY-18
High-Growth Markets	7.5% (15.5% in FY-17, l-f-l)	2.8%	4.5% (4.7% in FY-17)
Münster (6,125 units)	5.3%	1.1%	4.0% (4.1%)
Düsseldorf (5,307 units)	4.7%	1.5%	4.3% (4.2%)
Bielefeld (3,232 units)	13.7%	5.1%	5.4% (5.9%)
Stable markets	10.7% (12.5% in FY-17, l-f-l)	7.6%	6.0% (6.5% in FY-17)
Dortmund (13,596 units)	13.8%	9.2%	5.3% (6.0%)
Essen (3,372 units)	11.3%	8.4%	5.9% (6.5%)
Mönchengladbach (6,444 units)	10.1%	7.6%	6.2% (6.6%)
Higher-yielding markets	6.9% (8.8% in FY-17, l-f-l)	3.2%	6.9% (7.3% in FY-17)
Duisburg (6,907 units)	12.6%	4.5%	6.5% (7.1%)
Bochum (1,626 units)	12.0%	7.5%	5.5% (6.2%)
Gelsenkirchen (7,325 units)	3.4%	1.4%	7.0% (7.1%)
Total portfolio	8.2% (12.4% in FY-17, l-f-l)	4.2%	5.5% (5.9% in FY-17)

- Increasingly **positive momentum in the B-cities including higher-yielding markets**
- Especially smaller towns in the catchment areas are showing significant uplifts (Ratingen (7.8%; 3,129 units), Erkrath (12.7%; 719 units), Witten (13.5%; 1,558 units))

EPRA-Net Asset Value

31 December 2018



1) Valuation effects derivatives + deferred taxes are added back; 2) Valuation effects with respect to rent receivables and nominal, non-consolidated investments

Portfolio

Sound property fundamentals basis for value growth



As of 31.12.2018

Market	Residential Units	GAV Residential Assets (€m)	% of Total Residential GAV	GAV/sqm (€)	In-Place Rent Multiple	Market Multiples, Estimated Rental Values ¹⁾	GAV Commercial/Other Assets (€m)	Total GAV
High-Growth Markets	41,423	4,604	45%	1,675	22.1x	18.8x	219	4,824
Stable Markets	48,965	3,298	32%	1,048	16.6x	15.0x	119	3,417
Higher-Yielding Markets	41,731	2,215	22%	864	14.4x	13.2x	64	2,280
Subtotal NRW	132,119	10,118	98%	1,196	18.0x	16.0x	403	10,521
Portfolio outside NRW	1,850	165	2%	1,323	18.4x	16.8x	2	167
Total Portfolio	133,969	10,282	100%	1,198	18.0x	16.0x	405	10,687
Other Assets								
Total								10,755

¹⁾ As of December 31, 2018.

Balance Sheet

Strong balance sheet



€ million	31.12.2018	31.12.2017
Investment property	10,709.0	9,460.7
Other non-current assets	175.9	172.3
Non-current assets	10,884.9	9,633.0
Receivables and other assets	55.5	63.7
Cash and cash equivalents	233.6	285.4
Current assets	289.0	349.1
Assets held for sale	20.3	30.9
Total Assets	11,194.2	10,013.0
Equity	4,783.9	4,112.4
Non-current financing liabilities	4,113.3	3,821.4
Other non-current liabilities	1,382.3	1,158.8
Non-current liabilities	5,495.6	4,980.2
Current financing liabilities	484.8	478.2
Other current liabilities	429.9	442.2
Current liabilities	914.7	920.4
Total Equity and Liabilities	11,194.2	10,013.0

- Revaluation €800.9 m
- Net additions €257.5m
- Capex €174.0m

- Cash flow from operating activities €288.6m
- Investing activities - €431.9m
- Financing activities €91.5m

- Loan proceeds €392.2m and proceeds from commercial paper €150m
- Repayment of loans -€252.3m

LTV

Strong credit profile in more volatile financing environment



€ million	31.12.2018	31.12.2017
Financial liabilities	4,598.1	4,299.6
Cash & cash equivalents	233.6	285.4
Net Debt	4,364.5	4,014.2
Investment properties	10,709.0	9,460.7
Properties held for sale	20.3	30.9
Prepayments for investment properties	-	-
Business combinations	-	2.0
Property values	10,729.3	9,493.6
Loan to Value (LTV) in %	40.7	42.3
Pro forma LTV post conversion in %	38.0	39.4

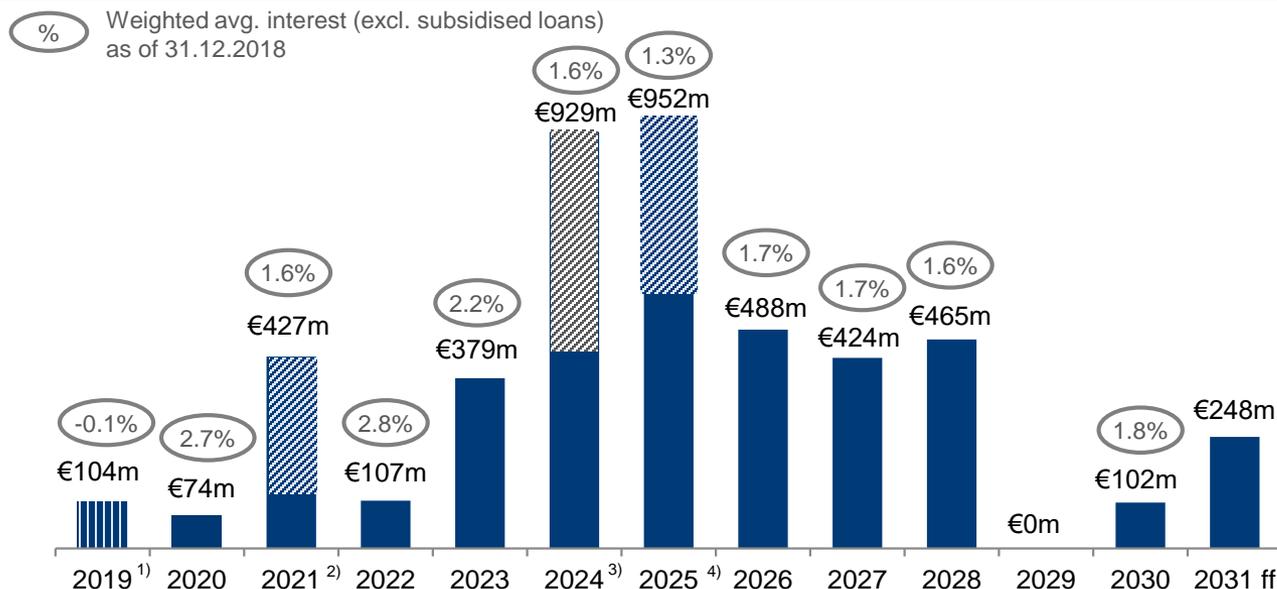
- Strong balance sheet with LTV at the lower end of the target range(40-45%) leaves headroom for growth investments without raising fresh equity
- Potential for further de-gearing via capital growth

- Potential impact on LTV from future conversion of 1st convertible (€300m nominal, currently -270bps)

Financing Structure – 31 December 2018



LT financing secures future earnings growth

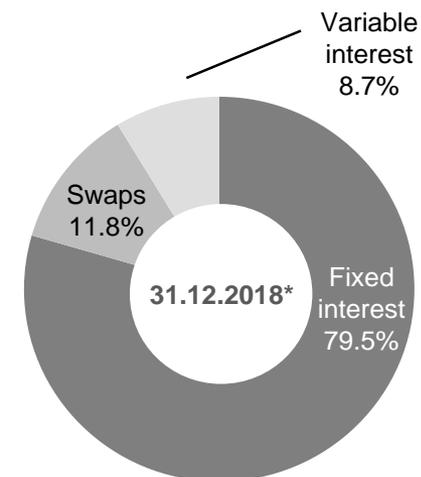


¹⁾ Commercial paper

²⁾ €300 m convertible bond with investor put option 2019

³⁾ Corporate bond (€500 m)

⁴⁾ €400 m convertible bond



*Including commercial paper

Key Facts

Average debt maturity	7.7 years (7.6 years*)
Interest costs	Ø 1.61% (1.58%*)
Hedging ratio	91.1% (91.3%*)
Rating	Baa1 (Moody's)

Maturities

0-2 years	0.6% (3.6%*)
3-5 years	20.1% (19.5%*)
6-8 years	52.1% (50.5%*)
≥ 9 years	27.2% (26.4%*)

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Outlook

Guidance for 2019 & 2020 confirmed

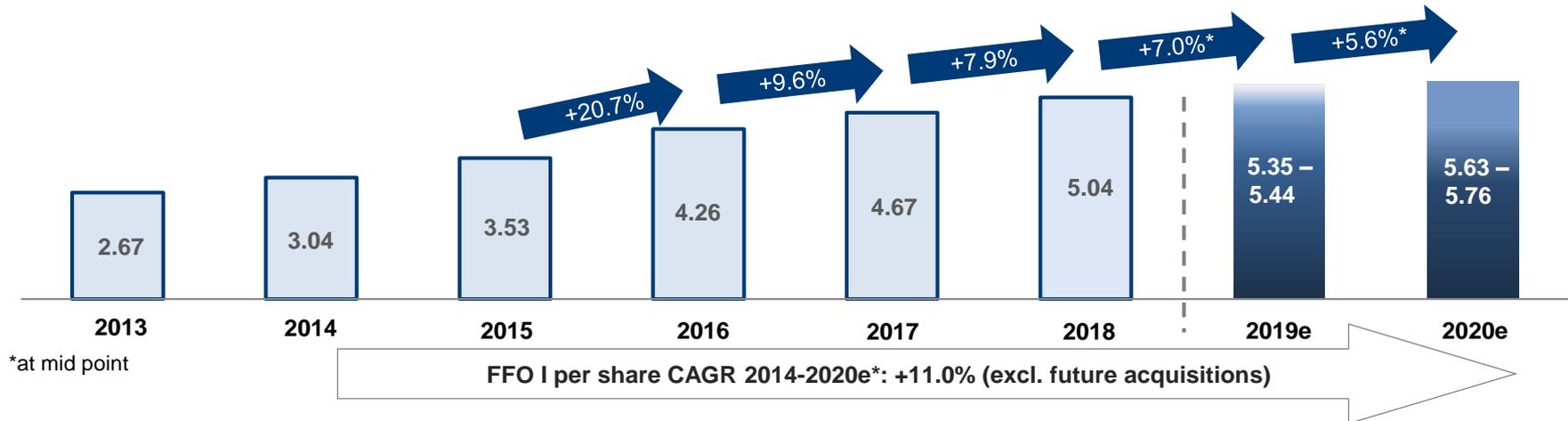


	2019	2020
KPI		
FFO I	€338m - €344m	€356m - €364m
FFO I per share	€5.35 - €5.44	€5.63 - €5.76
L-F-L rent growth	3.0-3.2%	3.2-3.4%
L-F-L vacancy	slightly decreasing	
EBITDA margin	~73%	~74%
Investments	~30-32€/sqm	~31-33€/sqm
Dividend	70 % of FFO I	70 % of FFO I

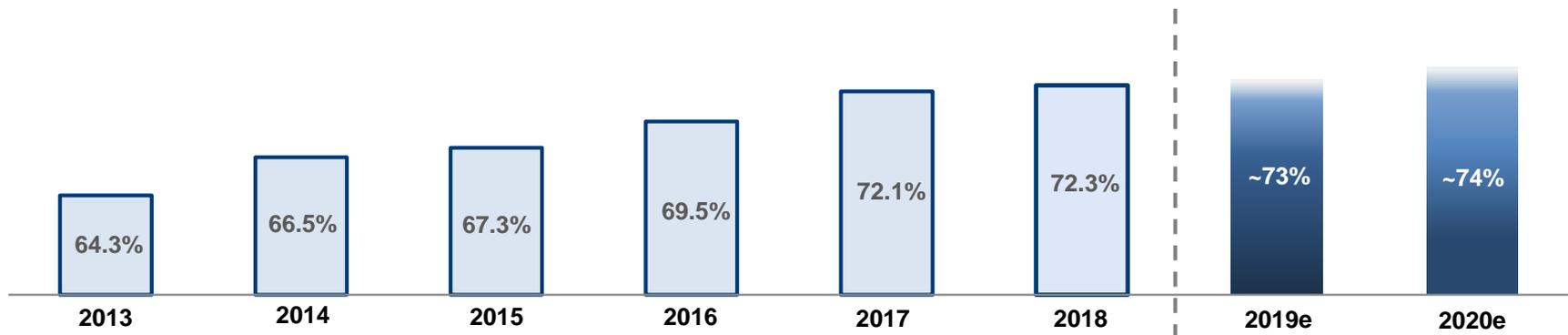
Steady Expansion of Leading FFO-Profitability



FFO I per share (€)



EBITDA Margin



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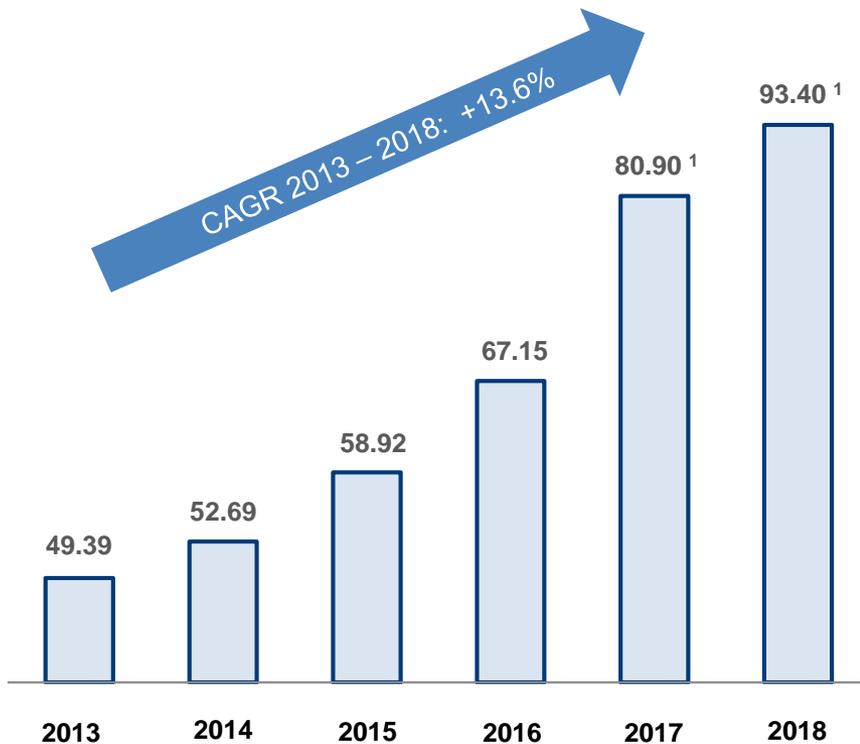


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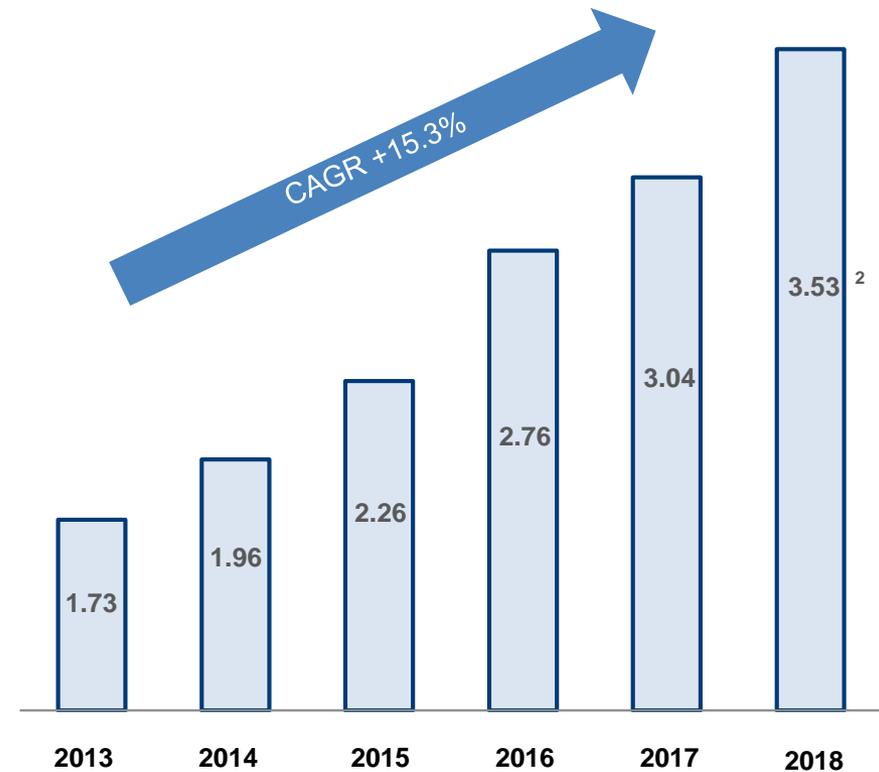
Generating Appealing Shareholder Returns



NAV per share (€), excl. goodwill



Dividend per share (€)



1) For 2017 & 2018, pro forma NAV per share is shown and applied.

2) Proposal to Annual General Meeting.

Income Statement

FY-2018



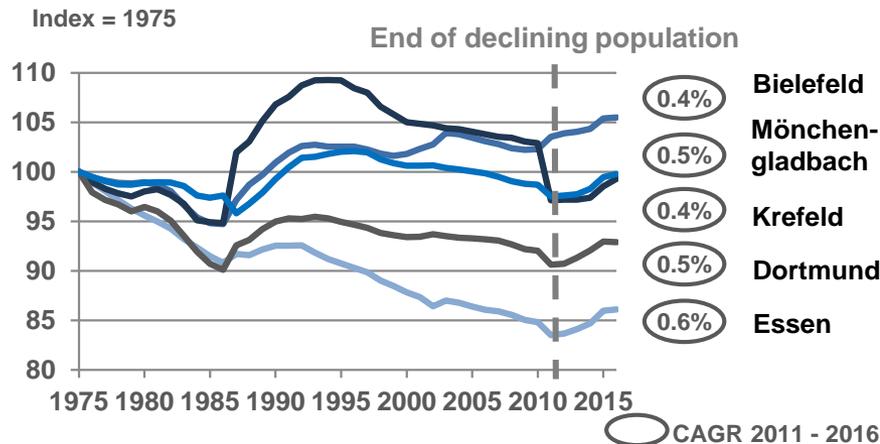
€ million	FY-2018	FY-2017	
Net rental and lease income	418.6	399.4	<ul style="list-style-type: none"> Higher rental income (+€25.5m YOY/+4.8%) Higher personnel expenses (+€4.5m) and one-time costs (+€2.4m)
Net income from the disposal of investment property	-0.9	-1.4	
Net income from the valuation of investment property	800.9	1,036.8	
Net income from the disposal of real estate inventory	-1.6	-2.3	<ul style="list-style-type: none"> Portfolio revaluation resulted in 8.2% appraisal gain (FY-2018)
Net income from other services	5.3	6.3	
Administrative and other expenses	-44.8	-41.3	<ul style="list-style-type: none"> Recurring admin. costs nearly stable (€34m/+€0.7m YOY), despite wage inflation and rising costs for regulatory requirements etc.
Other income	0.8	1.4	
Operating earnings	1,178.3	1,398.9	
Net finance costs	-81.9	-278.6	<ul style="list-style-type: none"> Net income from fair value measurement of derivatives €25.4m; thereof €26.5m from convertibles (FY-2017: -€138.2m) Lower cash interests (€77.2m; -€3.7m YOY) despite rising debt volume
Earnings before income taxes	1,096.4	1,120.3	
Income tax expenses	-249.3	-275.5	
Consolidated net profit	847.1	844.8	<ul style="list-style-type: none"> Cash taxes (-€5.8m)

Attractive NRW Market

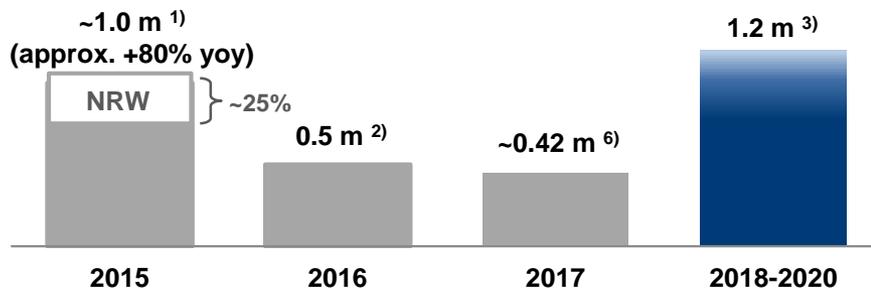
Positive demographics with stabilising net immigration



Cities entering upswing mode



Net immigration to Germany



Sources:

- 1) Interview with director of Federal Agency of Migration and Refugees (Aug 2016)
- 2) Federal Statistical Office, press release 13 Mar 2018
- 3) Deutsche Bundesbank, Monthly Report June 2018
- 4) Federal Statistical Office, press release 2 Nov 2017
- 5) Bundesamt für Migration und Flüchtlinge, January 2019
- 6) Federal Statistical Office, press release 15 Oct 2018

Key facts

- **Federal Agency of Migration and Refugees** collected data that **net immigration of foreigners to Germany** amounted to about **0.42 million** in 2017, thereof 0.18 million non-EU nationals⁶⁾
- **Deutsche Bundesbank** forecasts **1.2 million additional immigrants (net) for 2018-2020³⁾**
- **End of 2016, 1.6 million people seeking protection** (incl. asylum seekers) were registered in Germany (+113% vs 2014), the **majority living in NRW (27%)⁴⁾**
- **Stabilising net immigration** is already ongoing with **decreasing share of refugees** (c. -70% asylum seekers 2017 YOY; c. 0.2 million new asylum seekers in 2017)⁵⁾
- Immigration is **driving overall population growth, triggering additional growth in net new households**
- **Additional pressure on affordable housing segment**
- **Outperformance of German economy attracts qualified new immigration**
- **Liquid labour market and affordable living as pull-factors for NRW**

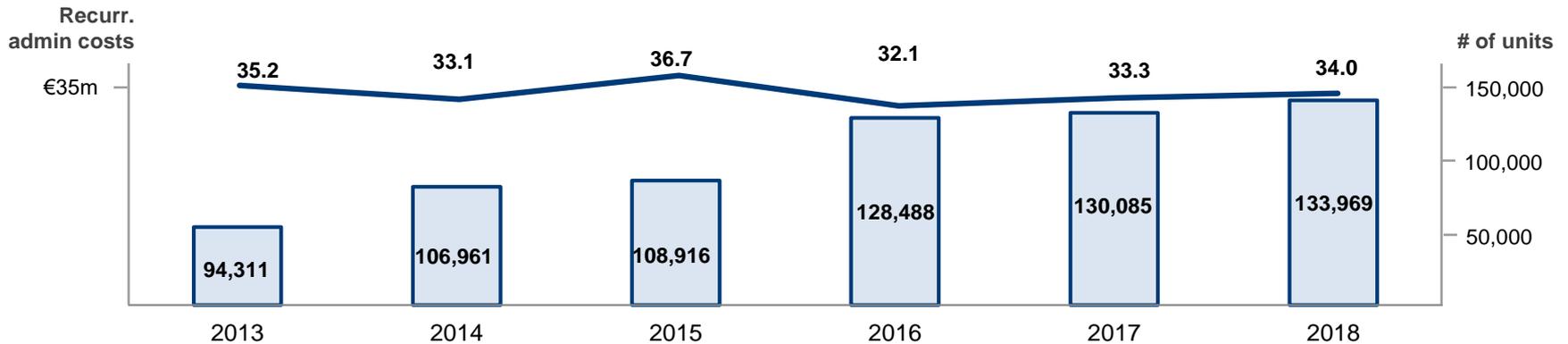
Acquisitions: Leading Management Skills Paying Off



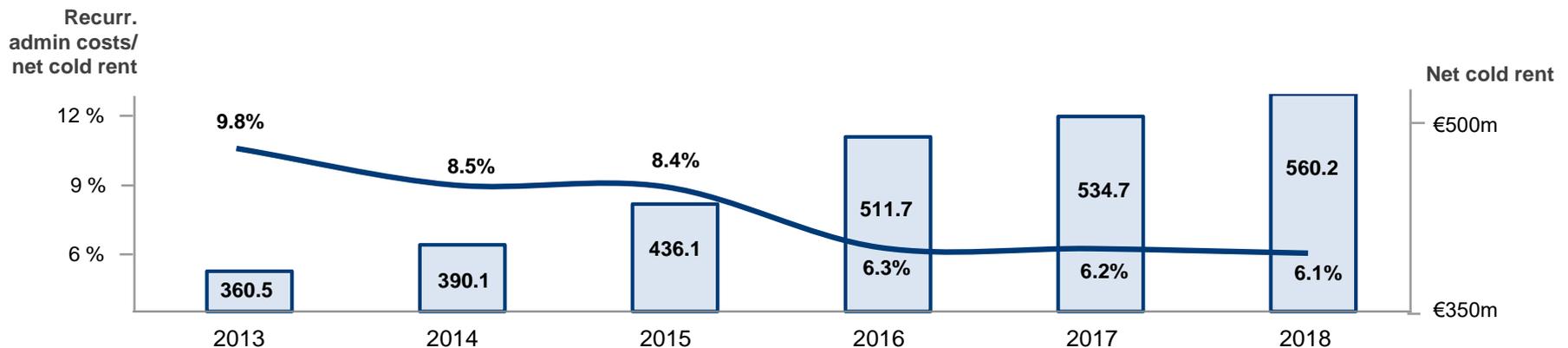
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Scalability of platform + cost discipline support value accretive growth

Strong volume growth at decreasing overhead cost...



...leads to a significant drop of the administrative costs ratio



EPRA Net Initial Yield FY-2018



€ million	31.12.2018	31.12.2017
Investment properties	10,702.2	9,448.0
Assets held for sale	20.3	30.9
Market value of residential property portfolio (net)	10,722.5	9,478.9
Estimated incidental costs	1,056.9	934.3
Market value of residential property portfolio (gross)	11,779.4	10,413.2
Annualised cash flow from rental income (gross)	564.9	524.3
Non recoverable operating costs	-61.8	-60.4
Annualised cash flow from rental income (net)	508.0	468.0
EPRA Net Initial Yield in %	4.3	4.5

LEG – Adj. EBITDA Margin

LEG

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Leading profitability despite short term distortion from restricted units

Adj. EBITDA margin	FY-2018		FY-2017	
	€m	margin %	€m	margin %
As reported	405.2	72.3	385.7	72.1
Gap restricted vs. unrestricted rents¹⁾	33.5	73.7	30.1	73.6

¹⁾ €/sqm: €4.77 vs. €6.00 in 2018, €/sqm: €4.74 vs. €5.81 in 2017

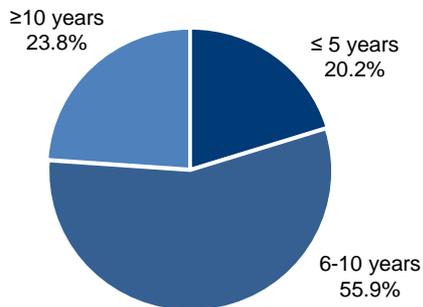
- EBITDA as reported distorted by restricted units (compensation for lower rents included in interest result below the EBITDA line)
- Scenario analysis: closing gap between restricted vs. unrestricted rents; **Adjusted EBITDA margin approx. 150 bps higher**

Rent revisionary potential

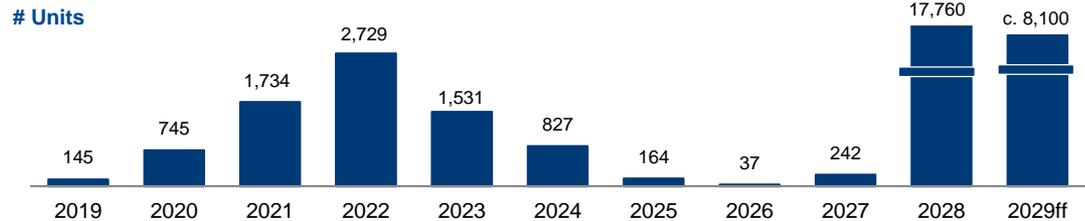
Refinancing of subsidised loans lifting value

Rent Potential Subsidised Units

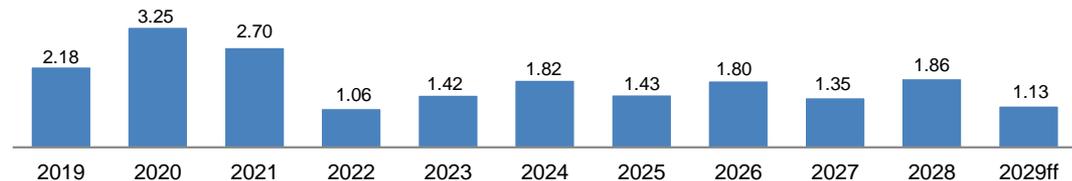
- In the following 10 years more than **25,000 units will come off rent restriction**
- Units show **significant upside to market rents**
- Subject to general legal and other restrictions, the **economic upside can theoretically be realised the year after restrictions expire**



Number of Units Coming Off Restriction and Rent Upside



Spread to Market Rent (in €/sqm/month)



	≤ 5 years ²⁾	6 – 10 years ²⁾	≥ 10 years ²⁾
In-place rent	€4.68	€4.87	€4.84
Market rent¹⁾	€6.52	€6.71	€5.97
Upside potential³⁾	39%	38%	23%
Upside potential p.a.³⁾	€10.43m	€22.62m	€11.97m

Source: LEG as of FY-2018

1) Employed by CBRE as indicator of an average rent value that could theoretically be achieved, not implying that an adjustment of the in-place rent to the market rent is feasible, as stringent legal and contractual restrictions regarding rent increases exist.

2) ≤5 years = 2019-2023; 6-10 years = 2024-2028; ≥10 years = 2029ff.

3) Rent upside is defined as the difference between LEG in-place rent as of FY-2018 and market rent (defined in footnote 1) as of FY-2017.

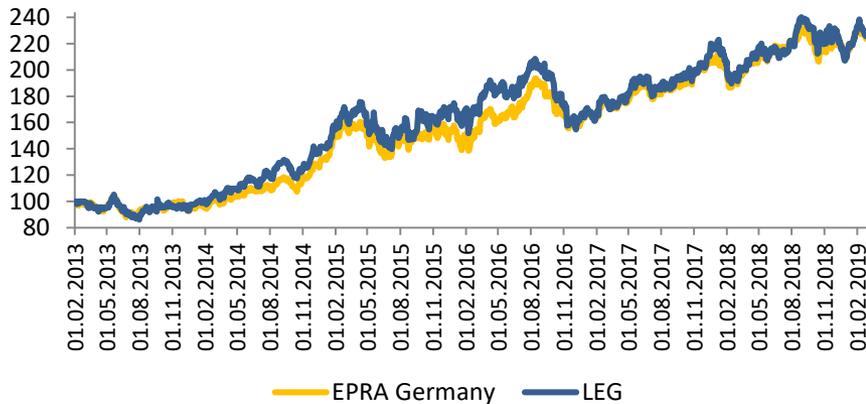
LEG Share Information



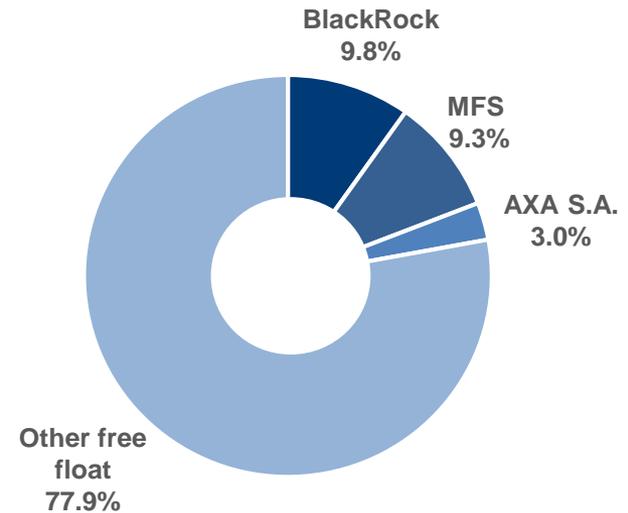
Basic data

- Prime Standard, Frankfurt Stock Exchange
- Total no. of shares: 63,188,185
- Ticker symbol: LEG
- ISIN: DE000LEG1110
- Indices: MDAX, FTSE EPRA/NAREIT, GPR 250, Stoxx Europe 600
- Weighting (31.01.2019): MDAX 2.78%; EPRA 2.79%
- Rating: Baa1 (stable) by Moody's

Share price (27.02.2018, indexed; 31.01.2013 = 100)



Well-balanced shareholder structure



Source: LEG; shareholdings according to voting rights notifications

Financial Calendar



Date	Report/Event
11.03.2019	Annual Report 2018
27.03.2019	Roadshow, Deutsche Bank, London
28.03.2019	European Real Estate Conference, Bank of America Merrill Lynch, London
28.03.2019	German Real Estate Forum, Commerzbank, London
09.04.2019	Roadshow, Hauck & Aufhäuser, Zurich
09.05.2019	Quarterly Statement Q1 as of 31 March 2019
29.05.2019	Annual General Meeting, Düsseldorf
09.08.2019	Quarterly Report Q2 as of 30 June 2019
15.11.2019	Quarterly Statement Q3 as of 30 September 2019

Contact

Investor Relations



Burkhard Sawazki

Head of Investor Relations &
Strategic Business Analysis
Tel: +49 (0) 211 4568-204
burkhard.sawazki@leg.ag

Karin Widenmann

Manager Investor Relations &
Strategic Business Analysis
Tel: +49 (0) 211 4568-458
karin.widenmann@leg.ag

Benedikt Kupka

Manager Investor Relations &
Strategic Business Analysis
Tel: +49 (0) 211 4568-286
benedikt.kupka@leg.ag

LEG Immobilien AG
Hans-Boeckler-Str. 38
40476 Düsseldorf, Germany

Phone: +49 (0) 211 4568-400
Fax: +49 (0) 211 4568-22 204
E-Mail: ir@leg.ag

Thank you for your interest.