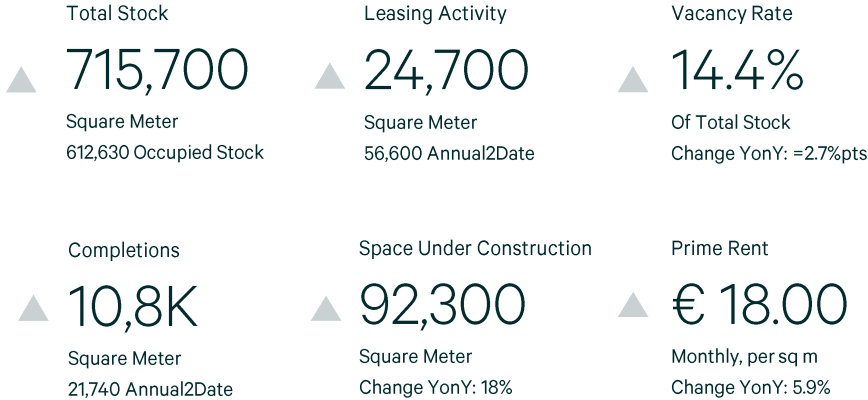


Brno Offices Market Figures

KEY PERFORMANCE INDICATORS (H2 2025)



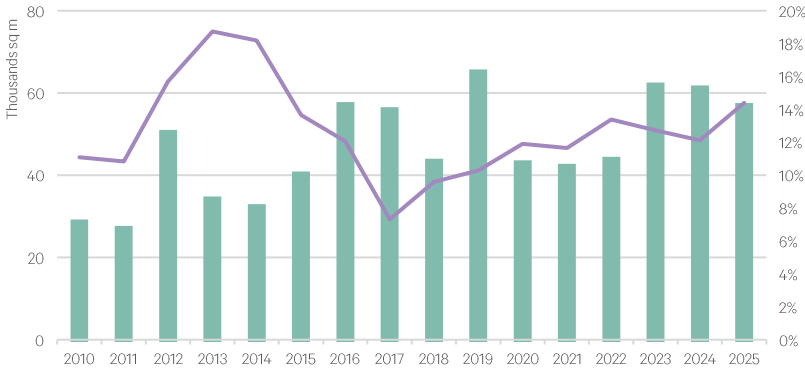
The total modern office stock in Brno expanded to 715,700 sq m. Only one office development was delivered in the second half of 2025, Cerit III- Botanická Living Lab (10,800 sq m). No new office construction was launched during H2 2025.

The vacancy rate rose to 14.4% representing an increase of 2.7 percentage points and corresponding to 103,100 sqm of vacant office space as of Q4 2025.

Total leasing activity (TLA) in H2 2025, reached 24,700 sq m reflecting a 29% decrease compared to the same period of the previous year. The most active sectors were from the Technology (49%), Manufacturing (15%) and Pharmaceutical / Medical (14%). New leases represented 43% of TLA, while pre-leases and renegotiation contributed 23%, followed by 11% of expansions.

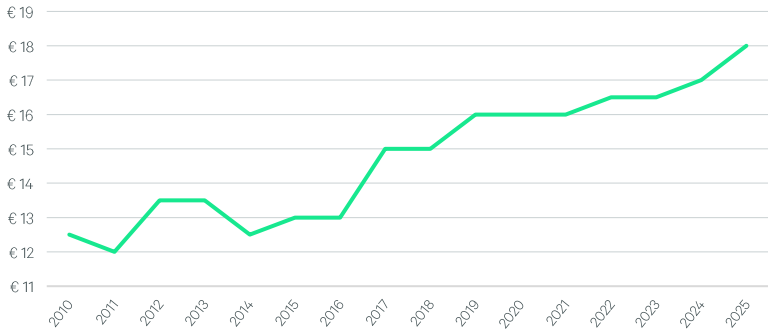
In H2 2025, take-up (excl. renegotiations) totalled 24,700 sq m. This represented an idecreased of 29% compared to to the same period last year, while reflecting a decrease of 23% compared to H1 2025.

MARKET TREND (Total leasing activity sq m | Vacancy rate)



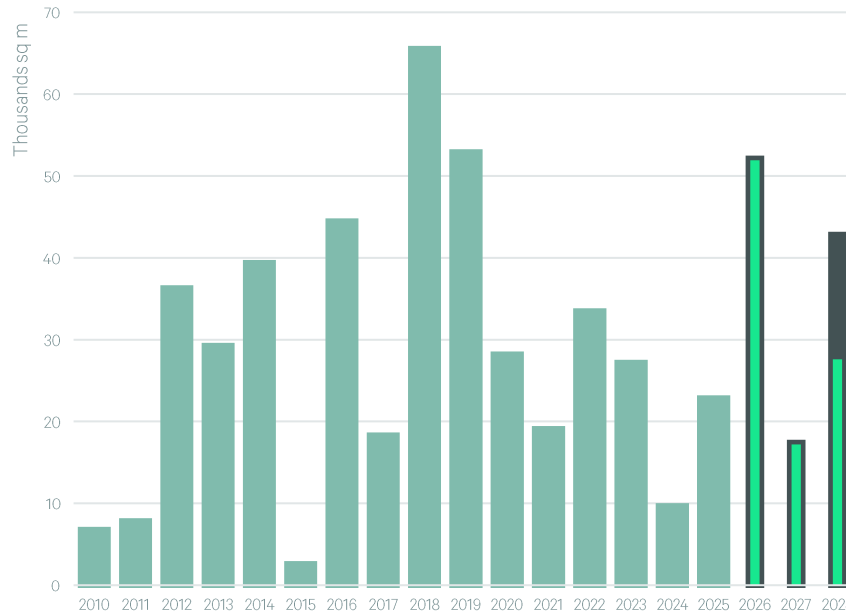
Source: CBRE Research, RRF, Q4 2025

PRIME RENT DEVELOPMENT (Euro/ sq m/ month)



Source: CBRE Research, RRF, Q4 2025

STOCK DEVELOPMENT (Completions | Forecast | Forecast UC)



Source: CBRE Research, RRF, Q4 2025

Prime rents on the Brno office market stood stable and range between 17.00 - 18.00 EUR/sq m/month in Q4 2025.

As the end of Q4 2025, the total amount of space under construction was 92,320 sq m in nine buildings. New project Dornych (27,600), Ponávka A4 (16,800 sqm), and Nová Zbrojovka D4 (10,500) being the largest. There are 6 projects, scheduled for delivery in the 2026 with a combined total around 51,900 sq m with an additional 40,400 sq m due for completion in the years 2027 and 2028

Definitions.

- Stock: Total completed office space (occupied and vacant), newly built since 1990 or refurbished, A and B class offices, owner occupied and for lease and public authorities' buildings. Buildings with leasable area lower than 1,000 sq m are excluded.
- Completions: Completed newly built or refurbished buildings that obtained a use permit in the given period.
- Total leasing activity: A gross figure representing the total floor space known to have been let or pre-let, sold or pre-sold to tenants or owner-occupiers over a specified period. It does not include space that is under offer. A property is taken up when the contract is signed. Total leasing activity includes renegotiations, lease extension and subleases, take-up excludes these.
- Vacancy rate: Ratio of physically vacant space in completed buildings on the total stock.
- Prime rent: Achieved rents that relate to new prime, high specification units in prime locations. However, there might be exceptional assets on the market, in which higher rent could be achieved.

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H2 2025

REPORT FIGURES

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