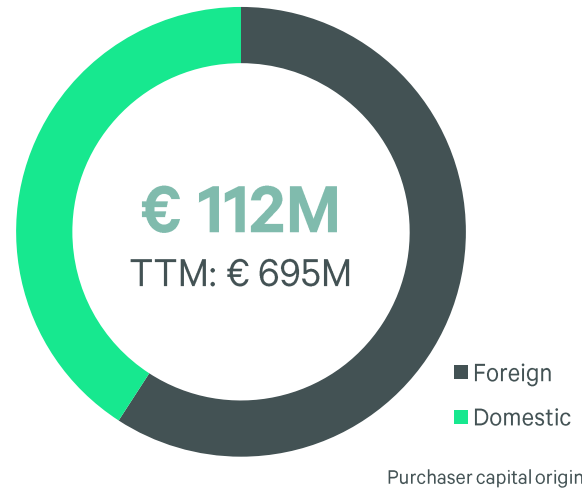


Slovakia Real Estate Investment Volumes Q1 2026

The investment activity in Q1 2026 reached a total of € 112 million across 5 transactions. On a trailing twelve-month basis, the cumulative investment volume stood at €695 million. Activity was recorded across four asset classes, with transactions closing in the retail, residential, office and industrial and logistics segments, reflecting broad market participation rather than concentration in a single sector.

Capital flows were firmly anchored in the region, with Czech investors leading the capital origin with a 48% share of total quarterly volume, followed by domestic Slovak capital at 41%, and South Korean investors contributing the remaining 11%. Central European capital collectively represented close to 90% of total quarterly volume, with both Czech and Slovak investors active across multiple sectors during the quarter. In terms of sector distribution, the retail segment captured the largest share of investment volume at 41%, followed by residential sector at 27%. The office sector accounted for 21% of transacted volume, while the industrial and logistics segment represented 11%.

Several transactions across all major sectors are currently in the sale process, with Czech and Slovak capital expected to remain the primary drivers of investment activity. Retail and industrial assets represent the most active segments of the current pipeline.



- 72%
Y-on-Y change Q1

- 25%
Y-on-Y change TTM

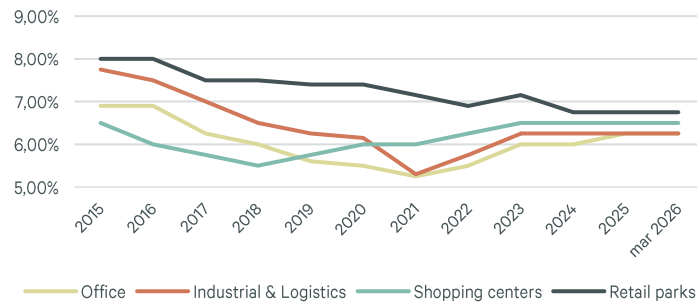
Nr. of transactions
5
25 TTM

Y-on-Y: Year on Year
TTM: Trailing Twelve Months

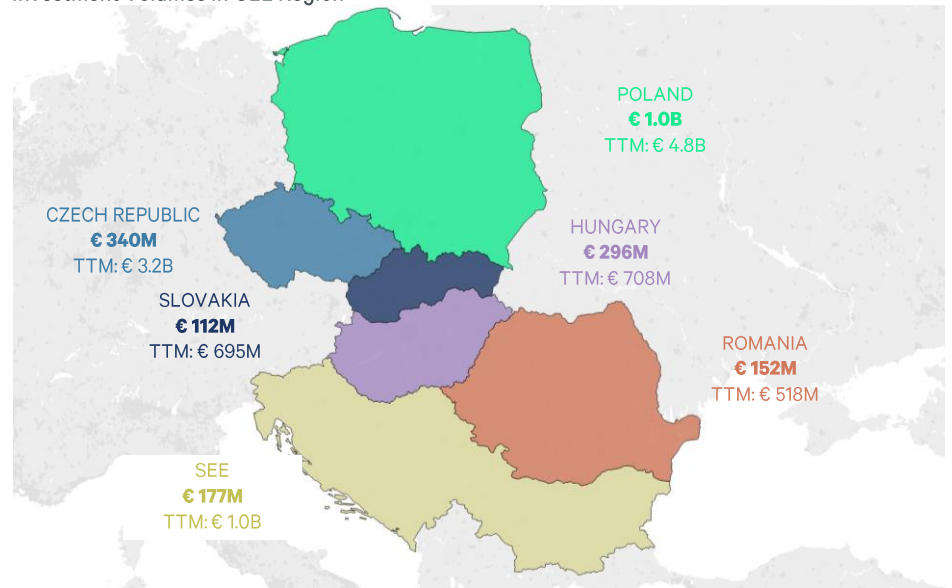
Investment Volumes by Sector



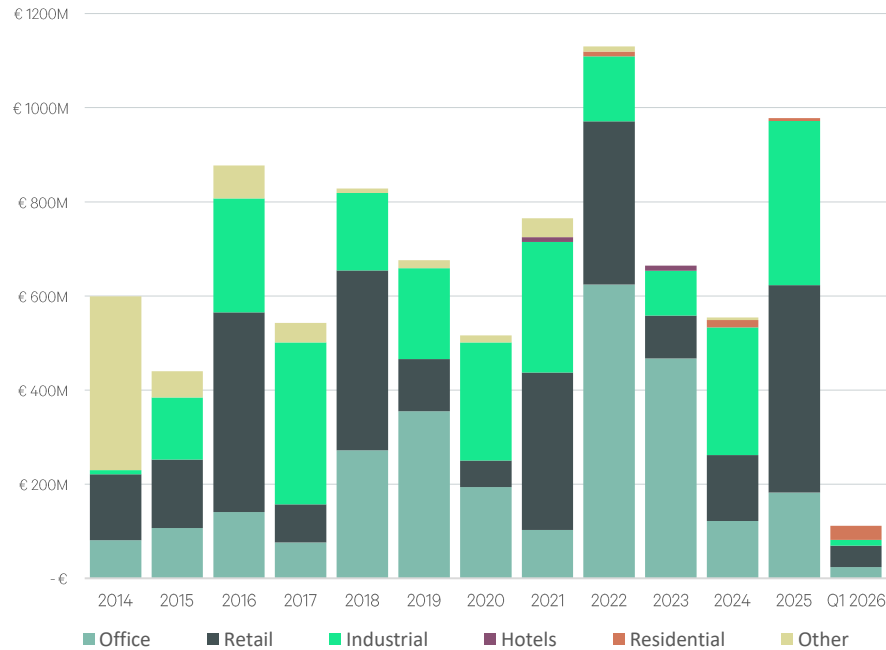
Prime Yield Development by Sector



Investment Volumes in CEE Region



Investment Volumes Annual by Sector (Slovakia)



The most notable office transaction recorded in Q1 2026 was the consolidation of full ownership of the Einsteinova Business Center, situated in Bratislava's Petržalka district, by CPI Property Group. CPI Europe, which previously held a 60% majority stake in the asset, acquired the remaining 40% minority interest from SJP Invest and Squid Ventures, with the transaction resulting in CPI becoming the sole owner of the complex. The Einsteinova Business Center offers approximately 23500 sq m of leasable office space, establishing it as one of the more substantial office assets in the Petržalka submarket.

In the retail segment, Tatra Asset Management completed the acquisition of OPC Revúca Retail Park from OPC Real Estate, the developer responsible for bringing the scheme to the market. The retail park comprises 6,300 sq m of retail space located in Revúca. The transaction marks OPC Real Estate's exit from the asset, concluded upon the completion of the development phase and the handover of a fully operational scheme.

Prime yields remained stable across sectors on a quarter-on-quarter basis. The office prime yield stood at 6.25%, representing an increase of 25 basis points compared to the same period of the prior year. The industrial & logistics prime yield held steady at 6.25%, while shopping center prime yield remained unchanged at 6.50%. Retail park yield closed the quarter at 6.75%, with no movement recorded across any sector during the period.

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Q1 2026

REPORT FIGURES

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