

上場不動産投資信託証券(REIT)投資主情報調査(2015年8月)資料集

REIT Investor Survey (August 2015)

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(注)1 掲載数値の端数処理は、実数値については切捨て、構成比は四捨五入としています。

2 表中の記号の用法は、次のとおりです。

「0」 単位未満

「－」 皆無又は該当数字なし

表 1 所有者別投資主数

Number of Investors by Holder Type

	2015年2月 (Feb, 2015)		2015年8月 (Aug, 2015)		増減・増減率 Change・% Change		構成比増減 Change in % of Total	人,% persons,% 株式分布状況調査 2014年度 Shareownership Survey 2014
銘柄数 Number of Listed Issues	46		50		4		ポイント point	3,565
合計 (1)+(5)+(6)+(7) Total	555,507	100.0	606,317	100.0	50,810	9.1	—	100.0
(1) 政府・地方公共団体 Govt. & Local Govt.	—	—	—	—	—	—	—	0.0
(5) 国内法人小計 (2)+(3)+(4) Domestic Corporation Subtotal	15,603	2.8	17,155	2.8	1,552	9.9	0.0	2.0
(2) 金融機関小計 a+b+c+d+e Financial Institutions	4,186	0.8	4,745	0.8	559	13.4	0.0	0.2
a 都銀・地銀等 City & Regional Banks	1,270	0.2	1,401	0.2	131	10.3	0.0	0.0
b 信託銀行 Trust Banks	509	0.1	543	0.1	34	6.7	0.0	0.1
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	184	0.0	200	0.0	16	8.7	0.0	0.0
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	158	0.0	171	0.0	13	8.2	0.0	0.0
c 生命保険会社 Life Insurance Companies	263	0.0	274	0.0	11	4.2	0.0	0.0
d 損害保険会社 Non-life Insurance Companies	92	0.0	109	0.0	17	18.5	0.0	0.0
e その他の金融機関 Other Financial Institutions	2,052	0.4	2,418	0.4	366	17.8	0.0	0.0
(3) 証券会社 Securities Companies	1,012	0.2	1,058	0.2	46	4.5	0.0	0.2
(4) 事業法人等 Business Corporations	10,405	1.9	11,352	1.9	947	9.1	0.0	1.6
(6) 外国法人等 Foreigners	8,609	1.5	9,267	1.5	658	7.6	0.0	0.8
(7) 個人・その他 Individuals	531,295	95.6	579,895	95.6	48,600	9.1	0.0	97.2

表 2 所有者別投資口数

Number of Investment Units by Holder Type

	2015年2月 (Feb, 2015)		2015年8月 (Aug, 2015)		増減・増減率 Change・% Change		所有比率 増減 Change in % of Total	口,% units,% 株式分布状況調査 2014年度 Shareownership Survey 2014
銘柄数 Number of Listed Issues	46		50		4		ポイント point	3,565
合計 (1)+(5)+(6)+(7) Total	41,519,685	100.0	44,768,111	100.0	3,248,426	7.8	—	100.0
(1) 政府・地方公共団体 Govt. & Local Govt.	—	—	—	—	—	—	—	0.2
(5) 国内法人小計 (2)+(3)+(4) Domestic Corporation Subtotal	26,836,295	64.6	29,896,106	66.8	3,059,811	11.4	2.2	49.4
(2) 金融機関小計 a+b+c+d+e Financial Institutions	21,695,054	52.3	24,335,859	54.4	2,640,805	12.2	2.1	23.8
a 都銀・地銀等 City & Regional Banks	2,289,432	5.5	2,679,182	6.0	389,750	17.0	0.5	3.0
b 信託銀行 Trust Banks	17,505,990	42.2	19,586,137	43.8	2,080,147	11.9	1.6	16.1
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	14,747,768	35.5	16,562,833	37.0	1,815,065	12.3	1.5	4.0
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	576,002	1.4	471,288	1.1	-104,714	-18.2	-0.3	1.7
c 生命保険会社 Life Insurance Companies	944,242	2.3	964,774	2.2	20,532	2.2	-0.1	2.9
d 損害保険会社 Non-life Insurance Companies	185,688	0.4	197,169	0.4	11,481	6.2	0.0	1.1
e その他の金融機関 Other Financial Institutions	769,702	1.9	908,597	2.0	138,895	18.0	0.1	0.7
(3) 証券会社 Securities Companies	853,579	2.1	939,901	2.1	86,322	10.1	0.0	2.5
(4) 事業法人等 Business Corporations	4,287,662	10.3	4,620,346	10.3	332,684	7.8	0.0	23.1
(6) 外国法人等 Foreigners	10,374,506	25.0	10,331,453	23.1	-43,053	-0.4	-1.9	28.0
(7) 個人・その他 Individuals	4,308,884	10.4	4,540,552	10.1	231,668	5.4	-0.3	22.4

表3 所有数別投資主数

Number of Investors by Number Held

	2015年2月 (Feb, 2015)		2015年8月 (Aug, 2015)		増減・増減率 Change・% Change		構成比増減 Change in % of Total	人,% persons, % 株式分布状況調査 2014年度 Shareownership Survey 2014
銘柄数 Number of Listed Issues	46		50		4		ポイント point	3,565
合計 (1)+(2)+(3) Total	555,507	100.0	606,317	100.0	50,810	9.1	—	100.0
(1) 49口以下 a+b+c 49 units or fewer	530,351	95.5	579,747	95.6	49,396	9.3	0.1	95.6
a 1口 - 4口 1 unit - 4 units	318,756	57.4	350,925	57.9	32,169	10.1	0.5	66.7
b 5口 - 9口 5 units - 9 units	106,472	19.2	116,153	19.2	9,681	9.1	0.0	11.0
c 10口 - 49口 10 units - 49 units	105,123	18.9	112,669	18.6	7,546	7.2	-0.3	17.9
(2) 50口 - 99口 50 units - 99 units	10,606	1.9	11,206	1.8	600	5.7	-0.1	2.0
(3) 100口以上 d+e+f+g 100 units or more	14,550	2.6	15,364	2.5	814	5.6	-0.1	2.3
d 100口 - 499口 100 units - 499 units	9,476	1.7	10,051	1.7	575	6.1	0.0	1.8
e 500口 - 999口 500 units - 999 units	1,818	0.3	1,913	0.3	95	5.2	0.0	0.2
f 1000口 - 4999口 1000 units - 4999 units	2,332	0.4	2,443	0.4	111	4.8	0.0	0.2
g 5000口以上 5000 units or more	924	0.2	957	0.2	33	3.6	0.0	0.1

表4 所有数別投資口数

Number of Investment Units by Number Held

	2015年2月 (Feb, 2015)		2015年8月 (Aug, 2015)		増減・増減率 Change・% Change		構成比増減 Change in % of Total	口,% units,% 株式分布状況調査 2014年度 Shareownership Survey 2014
銘柄数 Number of Listed Issues	46		50		4		ポイント point	3,565
合計 (1)+(2)+(3) Total	41,519,685	100.0	44,768,111	100.0	3,248,426	7.8	—	100.0
(1) 49口以下 a+b+c 49 units or fewer	3,025,961	7.3	3,268,848	7.3	242,887	8.0	0.0	8.9
a 1口 - 4口 1 unit - 4 units	615,190	1.5	676,384	1.5	61,194	9.9	0.0	2.0
b 5口 - 9口 5 units - 9 units	620,020	1.5	678,213	1.5	58,193	9.4	0.0	1.2
c 10口 - 49口 10 units - 49 units	1,790,751	4.3	1,914,251	4.3	123,500	6.9	0.0	5.7
(2) 50口 - 99口 50 units - 99 units	671,179	1.6	711,047	1.6	39,868	5.9	0.0	2.4
(3) 100口以上 d+e+f+g 100 units or more	37,822,545	91.1	40,788,216	91.1	2,965,671	7.8	0.0	88.8
d 100口 - 499口 100 units - 499 units	1,909,115	4.6	2,038,736	4.6	129,621	6.8	0.0	5.9
e 500口 - 999口 500 units - 999 units	1,243,928	3.0	1,321,621	3.0	77,693	6.2	0.0	2.7
f 1000口 - 4999口 1000 units - 4999 units	4,985,088	12.0	5,320,620	11.9	335,532	6.7	-0.1	9.6
g 5000口以上 5000 units or more	29,684,414	71.5	32,107,239	71.7	2,422,825	8.2	0.2	70.5

表5 地方別投資主数
Number of Investors by Region

	2015年2月 (Feb, 2015)		2015年8月 (Aug, 2015)		増減・増減率 Change・% Change		構成比増減 Change in % of Total	人,% persons,% 株式分布状況調査 2014年度 Shareownership Survey 2014
銘柄数 Number of Listed Issues	46		50		4		ポイント point	3,565
合 計 Total	555,507	100.0	606,317	100.0	50,810	9.1	—	100.0
北海道 Hokkaido	9,175	1.7	10,310	1.7	1,135	12.4	0.0	1.6
東北 Tohoku	14,056	2.5	15,864	2.6	1,808	12.9	0.1	2.9
関東 Kanto	271,472	48.9	293,100	48.3	21,628	8.0	-0.6	41.4
中部 Chubu	80,386	14.5	88,314	14.6	7,928	9.9	0.1	17.9
近畿 Kinki	107,188	19.3	118,270	19.5	11,082	10.3	0.2	22.8
中国 Chugoku	22,393	4.0	24,654	4.1	2,261	10.1	0.1	4.8
四国 Shikoku	14,634	2.6	15,910	2.6	1,276	8.7	0.0	2.6
九州 Kyushu	27,839	5.0	30,883	5.1	3,044	10.9	0.1	5.1
海外 Overseas	8,364	1.5	9,012	1.5	648	7.7	0.0	0.8

表6 地方別投資口数
Number of Investment Units by Region

	2015年2月 (Feb, 2015)		2015年8月 (Aug, 2015)		増減・増減率 Change・% Change		構成比増減 Change in % of Total	口,% units,% 株式分布状況調査 2014年度 Shareownership Survey 2014
銘柄数 Number of Listed Issues	46		50		4		ポイント point	3,565
合 計 Total	41,519,685	100.0	44,768,111	100.0	3,248,426	7.8	—	100.0
北海道 Hokkaido	97,331	0.2	120,048	0.3	22,717	23.3	0.1	0.4
東北 Tohoku	326,710	0.8	372,415	0.8	45,705	14.0	0.0	0.8
関東 Kanto	26,012,792	62.7	28,601,467	63.9	2,588,675	10.0	1.2	52.5
中部 Chubu	1,495,904	3.6	1,715,247	3.8	219,343	14.7	0.2	6.6
近畿 Kinki	1,633,784	3.9	1,932,034	4.3	298,250	18.3	0.4	8.1
中国 Chugoku	568,348	1.4	607,984	1.4	39,636	7.0	0.0	1.3
四国 Shikoku	455,756	1.1	487,482	1.1	31,726	7.0	0.0	0.9
九州 Kyushu	567,020	1.4	618,284	1.4	51,264	9.0	0.0	1.4
海外 Overseas	10,362,040	25.0	10,313,150	23.0	-48,890	-0.5	-2.0	27.9

表7 東証REIT用途別指数の構成銘柄別にみた所有者別投資主数

Number of Investors by Holder Type by TSE REIT Property Sector Index

人,% persons,%

カテゴリー Category	合計 Total		オフィス指数 Office Index		住宅指数 Residential Index		商業・物流等指数 Retail & Logistics, Others Index	
銘柄数 Number of Listed Issues	50		21		12		17	
合計 (1)+(5)+(6)+(7) Total	606,317	100.0	268,898	100.0	134,286	100.0	203,133	100.0
(1) 政府・地方公共団体 Govt. & Local Govt.	—	—	—	—	—	—	—	—
(5) 国内法人小計 (2)+(3)+(4) Domestic Corporation Subtotal	17,155	2.8	7,610	2.8	3,301	2.5	6,244	3.1
(2) 金融機関小計 a+b+c+d+e Financial Institutions	4,745	0.8	2,004	0.7	897	0.7	1,844	0.9
a 都銀・地銀等 City & Regional Banks	1,401	0.2	560	0.2	281	0.2	560	0.3
b 信託銀行 Trust Banks	543	0.1	232	0.1	123	0.1	188	0.1
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	200	0.0	84	0.0	48	0.0	68	0.0
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	171	0.0	72	0.0	39	0.0	60	0.0
c 生命保険会社 Life Insurance Companies	274	0.0	110	0.0	55	0.0	109	0.1
d 損害保険会社 Non-life Insurance Companies	109	0.0	46	0.0	29	0.0	34	0.0
e その他の金融機関 Other Financial Institutions	2,418	0.4	1,056	0.4	409	0.3	953	0.5
(3) 証券会社 Securities Companies	1,058	0.2	454	0.2	248	0.2	356	0.2
(4) 事業法人等 Business Corporations	11,352	1.9	5,152	1.9	2,156	1.6	4,044	2.0
(6) 外国法人等 Foreigners	9,267	1.5	4,163	1.5	1,656	1.2	3,448	1.7
(7) 個人・その他 Individuals	579,895	95.6	257,125	95.6	129,329	96.3	193,441	95.2

表8 東証REIT用途別指数の構成銘柄別にみた所有者別投資口数

Number of Investment Units by Holder Type by TSE REIT Property Sector Index

口,% units,%

カテゴリー Category	合計 Total		オフィス指数 Office Index		住宅指数 Residential Index		商業・物流等指数 Retail & Logistics, Others Index	
銘柄数 Number of Listed Issues	50		21		12		17	
合計 (1)+(5)+(6)+(7) Total	44,768,111	100.0	16,251,480	100.0	9,898,735	100.0	18,617,896	100.0
(1) 政府・地方公共団体 Govt. & Local Govt.	—	—	—	—	—	—	—	—
(5) 国内法人小計 (2)+(3)+(4) Domestic Corporation Subtotal	29,896,106	66.8	11,063,539	68.1	6,982,756	70.5	11,849,811	63.6
(2) 金融機関小計 a+b+c+d+e Financial Institutions	24,335,859	54.4	8,986,664	55.3	5,428,819	54.8	9,920,376	53.3
a 都銀・地銀等 City & Regional Banks	2,679,182	6.0	977,240	6.0	531,255	5.4	1,170,687	6.3
b 信託銀行 Trust Banks	19,586,137	43.8	7,180,473	44.2	4,517,599	45.6	7,888,065	42.4
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	16,562,833	37.0	5,999,622	36.9	3,931,091	39.7	6,632,120	35.6
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	471,288	1.1	126,896	0.8	163,254	1.6	181,138	1.0
c 生命保険会社 Life Insurance Companies	964,774	2.2	409,789	2.5	151,194	1.5	403,791	2.2
d 損害保険会社 Non-life Insurance Companies	197,169	0.4	59,173	0.4	83,724	0.8	54,272	0.3
e その他の金融機関 Other Financial Institutions	908,597	2.0	359,989	2.2	145,047	1.5	403,561	2.2
(3) 証券会社 Securities Companies	939,901	2.1	341,497	2.1	128,609	1.3	469,795	2.5
(4) 事業法人等 Business Corporations	4,620,346	10.3	1,735,378	10.7	1,425,328	14.4	1,459,640	7.8
(6) 外国法人等 Foreigners	10,331,453	23.1	3,458,436	21.3	1,838,087	18.6	5,034,930	27.0
(7) 個人・その他 Individuals	4,540,552	10.1	1,729,505	10.6	1,077,892	10.9	1,733,155	9.3

表 9 東証REIT用途別指数の構成銘柄別にみた所有数別投資主数
Number of Investors by Number Held by TSE REIT Property Sector Index

人,% persons, %

カテゴリー Category	合計 Total		オフィス指数 Office Index		住宅指数 Residential Index		商業・物流等指数 Retail & Logistics, Others Index	
銘柄数 Number of Listed Issues	50		21		12		17	
合計 (1)+(2)+(3) Total	606,317	100.0	268,898	100.0	134,286	100.0	203,133	100.0
(1) 49口以下 a+b+c 49 units or fewer	579,747	95.6	258,317	96.1	128,836	95.9	192,594	94.8
a 1口 - 4口 1 unit - 4 units	350,925	57.9	162,534	60.4	81,564	60.7	106,827	52.6
b 5口 - 9口 5 units - 9 units	116,153	19.2	51,595	19.2	23,842	17.8	40,716	20.0
c 10口 - 49口 10 units - 49 units	112,669	18.6	44,188	16.4	23,430	17.4	45,051	22.2
(2) 50口 - 99口 50 units - 99 units	11,206	1.8	4,437	1.7	2,477	1.8	4,292	2.1
(3) 100口以上 d+e+f+g 100 units or more	15,364	2.5	6,144	2.3	2,973	2.2	6,247	3.1
d 100口 - 499口 100 units - 499 units	10,051	1.7	4,068	1.5	1,971	1.5	4,012	2.0
e 500口 - 999口 500 units - 999 units	1,913	0.3	770	0.3	367	0.3	776	0.4
f 1000口 - 4999口 1000 units - 4999 units	2,443	0.4	948	0.4	457	0.3	1,038	0.5
g 5000口以上 5000 units or more	957	0.2	358	0.1	178	0.1	421	0.2

表 10 東証REIT用途別指数の構成銘柄別にみた所有数別投資口数
Number of Investment Units by Number Held by TSE REIT Property Sector Index

口,% units, %

カテゴリー Category	合計 Total		オフィス指数 Office Index		住宅指数 Residential Index		商業・物流等指数 Retail & Logistics, Others Index	
銘柄数 Number of Listed Issues	50		21		12		17	
合計 (1)+(2)+(3) Total	44,768,111	100.0	16,251,480	100.0	9,898,735	100.0	18,617,896	100.0
(1) 49口以下 a+b+c 49 units or fewer	3,268,848	7.3	1,338,976	8.2	739,131	7.5	1,190,741	6.4
a 1口 - 4口 1 unit - 4 units	676,384	1.5	299,091	1.8	174,744	1.8	202,549	1.1
b 5口 - 9口 5 units - 9 units	678,213	1.5	295,791	1.8	147,721	1.5	234,701	1.3
c 10口 - 49口 10 units - 49 units	1,914,251	4.3	744,094	4.6	416,666	4.2	753,491	4.0
(2) 50口 - 99口 50 units - 99 units	711,047	1.6	280,507	1.7	159,666	1.6	270,874	1.5
(3) 100口以上 d+e+f+g 100 units or more	40,788,216	91.1	14,631,997	90.0	8,999,938	90.9	17,156,281	92.1
d 100口 - 499口 100 units - 499 units	2,038,736	4.6	841,335	5.2	396,370	4.0	801,031	4.3
e 500口 - 999口 500 units - 999 units	1,321,621	3.0	534,329	3.3	254,331	2.6	532,961	2.9
f 1000口 - 4999口 1000 units - 4999 units	5,320,620	11.9	2,038,480	12.5	991,210	10.0	2,290,930	12.3
g 5000口以上 5000 units or more	32,107,239	71.7	11,217,853	69.0	7,358,027	74.3	13,531,359	72.7

表 1 1 投資部門別REIT保有金額
REIT Holding by Investor Type

億円,% ¥100 mil.,%

	2015年2月 (Feb, 2015)		2015年8月 (Aug, 2015)		増減・増減率 Change・% Change		保有比率 増減 Change in % of Total	株式分布状況調 査 2014年度 Shareownership Survey
銘柄数 Number of Listed Issues	46		50		4		ポイント point	3,565
合計 (1)+(5)+(6)+(7) Total	106,702	100.0	95,837	100.0	-10,865	-10.2	—	100.0
(1) 政府・地方公共団体 Govt. & Local Govt.	—	—	—	—	—	—	—	0.2
(5) 国内法人小計 (2)+(3)+(4) Domestic Corporation Subtotal	71,540	67.0	65,604	68.5	-5,936	-8.3	1.5	50.9
(2) 金融機関小計 a+b+c+d+e Financial Institutions	58,464	54.8	53,931	56.3	-4,533	-7.8	1.5	27.4
a 都銀・地銀等 City & Regional Banks	7,305	6.8	6,790	7.1	-515	-7.0	0.3	3.7
b 信託銀行 Trust Banks	45,584	42.7	42,182	44.0	-3,402	-7.5	1.3	18.0
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	37,506	35.2	34,969	36.5	-2,537	-6.8	1.3	4.8
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	1,328	1.2	963	1.0	-365	-27.5	-0.2	1.8
c 生命保険会社 Life Insurance Companies	2,737	2.6	2,357	2.5	-380	-13.9	-0.1	3.6
d 損害保険会社 Non-life Insurance Companies	602	0.6	489	0.5	-113	-18.8	-0.1	1.4
e その他の金融機関 Other Financial Institutions	2,233	2.1	2,111	2.2	-122	-5.5	0.1	0.7
(3) 証券会社 Securities Companies	2,306	2.2	1,998	2.1	-308	-13.4	-0.1	2.2
(4) 事業法人等 Business Corporations	10,769	10.1	9,674	10.1	-1,095	-10.2	0.0	21.3
(6) 外国法人等 Foreigners	24,820	23.3	21,233	22.2	-3,587	-14.5	-1.1	31.7
(7) 個人・その他 Individuals	10,341	9.7	8,999	9.4	-1,342	-13.0	-0.3	17.3

表 1 2 地方別REIT保有金額
REIT Holding by Region

億円,% ¥100 mil.,%

	2015年2月 (Feb, 2015)		2015年8月 (Aug, 2015)		増減・増減率 Change・% Change		構成比増減 Change in % of Total	株式分布状況調 査 2014年度 Shareownership Survey
銘柄数 Number of Listed Issues	46		50		4		ポイント point	3,565
合 計 Total	106,702	100.0	95,837	100.0	-10,865	-10.2	—	100.0
北 海 道 Hokkaido	254	0.2	272	0.3	18	7.1	0.1	0.4
東 北 Tohoku	881	0.8	830	0.9	-51	-5.8	0.1	0.5
関 東 Kanto	67,540	63.3	61,564	64.2	-5,976	-8.8	0.9	50.1
中 部 Chubu	4,117	3.9	3,853	4.0	-264	-6.4	0.1	7.1
近 畿 Kinki	4,644	4.4	4,189	4.4	-455	-9.8	0.0	7.4
中 国 Chugoku	1,836	1.7	1,596	1.7	-240	-13.1	0.0	1.1
四 国 Shikoku	1,152	1.1	1,023	1.1	-129	-11.2	0.0	0.8
九 州 Kyushu	1,491	1.4	1,321	1.4	-170	-11.4	0.0	1.1
海 外 Overseas	24,782	23.2	21,186	22.1	-3,596	-14.5	-1.1	31.6

表 1 3 東証REIT用途別指数の構成銘柄別にみた投資部門別REIT保有金額
REIT Holding by Investor Type by TSE REIT Property Sector Index

億円,% ¥100 mil.,%

カテゴリー Category	合計 Total		オフィス指数 Office Index		住宅指数 Residential Index		商業・物流等指数 Retail & Logistics, Others Index	
銘柄数 Number of Listed Issues	50		21		12		17	
合計 (1)+(5)+(6)+(7) Total	95,837	100.0	44,557	100.0	15,748	100.0	35,532	100.0
(1) 政府・地方公共団体 Govt. & Local Govt.	—	—	—	—	—	—	—	—
(5) 国内法人小計 (2)+(3)+(4) Domestic Corporation Subtotal	65,604	68.5	30,224	67.8	11,571	73.5	23,807	67.0
(2) 金融機関小計 a+b+c+d+e Financial Institutions	53,931	56.3	24,485	55.0	9,558	60.7	19,887	56.0
a 都銀・地銀等 City & Regional Banks	6,790	7.1	2,874	6.5	1,211	7.7	2,705	7.6
b 信託銀行 Trust Banks	42,182	44.0	19,296	43.3	7,517	47.7	15,369	43.3
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	34,969	36.5	15,953	35.8	6,201	39.4	12,814	36.1
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	963	1.0	372	0.8	269	1.7	321	0.9
c 生命保険会社 Life Insurance Companies	2,357	2.5	1,221	2.7	334	2.1	800	2.3
d 損害保険会社 Non-life Insurance Companies	489	0.5	149	0.3	181	1.2	158	0.4
e その他の金融機関 Other Financial Institutions	2,111	2.2	944	2.1	312	2.0	854	2.4
(3) 証券会社 Securities Companies	1,998	2.1	853	1.9	231	1.5	913	2.6
(4) 事業法人等 Business Corporations	9,674	10.1	4,886	11.0	1,781	11.3	3,006	8.5
(6) 外国法人等 Foreigners	21,233	22.2	9,960	22.4	2,496	15.9	8,776	24.7
(7) 個人・その他 Individuals	8,999	9.4	4,371	9.8	1,679	10.7	2,947	8.3

【参考】

1 東証REIT用途別指数の構成銘柄別にみた所有者別投資口数の2期比較

2015年8月(Aug, 2015)

口,% units,%

所有比率増減

ポイント,point

カテゴリー Category	オフィス指数 Office Index		住宅指数 Residential Index		商業・物流等指数 Retail & Logistics, Others Index		オフィス 指数 Office Index	住宅指数 Residential Index	商業・物流等 指数 Retail & Logistics, Others Index
銘柄数 Number of Listed Issues	21		12		17				
合計 (1)+(5)+(6)+(7) Total	16,251,480	100.0	9,898,735	100.0	18,617,896	100.0			
(1) 政府・地方公共団体 Govt. & Local Govt.	—	—	—	—	—	—	—	—	—
(5) 国内法人小計 (2)+(3)+(4) Domestic Corporation Subtotal	11,063,539	68.1	6,982,756	70.5	11,849,811	63.6	1.7	3.4	1.8
(2) 金融機関小計 a+b+c+d+e Financial Institutions	8,986,664	55.3	5,428,819	54.8	9,920,376	53.3	2.0	3.5	1.5
a 都銀・地銀等 City & Regional Banks	977,240	6.0	531,255	5.4	1,170,687	6.3	0.4	0.8	0.4
b 信託銀行 Trust Banks	7,180,473	44.2	4,517,599	45.6	7,888,065	42.4	1.6	2.4	1.2
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	5,999,622	36.9	3,931,091	39.7	6,632,120	35.6	1.9	2.7	0.5
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	126,896	0.8	163,254	1.6	181,138	1.0	-0.2	-0.9	-0.2
c 生命保険会社 Life Insurance Companies	409,789	2.5	151,194	1.5	403,791	2.2	-0.3	0.0	-0.1
d 損害保険会社 Non-life Insurance Companies	59,173	0.4	83,724	0.8	54,272	0.3	0.0	0.0	0.0
e その他の金融機関 Other Financial Institutions	359,989	2.2	145,047	1.5	403,561	2.2	0.2	0.3	0.1
(3) 証券会社 Securities Companies	341,497	2.1	128,609	1.3	469,795	2.5	0.1	-0.1	0.1
(4) 事業法人等 Business Corporations	1,735,378	10.7	1,425,328	14.4	1,459,640	7.8	-0.3	-0.1	0.2
(6) 外国法人等 Foreigners	3,458,436	21.3	1,838,087	18.6	5,034,930	27.0	-1.7	-1.9	-2.1
(7) 個人・その他 Individuals	1,729,505	10.6	1,077,892	10.9	1,733,155	9.3	0.0	-1.5	0.2

2015年2月(Feb, 2015)

口,% units,%

カテゴリー Category	オフィス指数 Office Index		住宅指数 Residential Index		商業・物流等指数 Retail & Logistics, Others Index	
銘柄数 Number of Listed Issues	20		11		15	
合計 (1)+(5)+(6)+(7) Total	15,097,404	100.0	9,063,272	100.0	17,359,009	100.0
(1) 政府・地方公共団体 Govt. & Local Govt.	—	—	—	—	—	—
(5) 国内法人小計 (2)+(3)+(4) Domestic Corporation Subtotal	10,021,257	66.4	6,082,080	67.1	10,732,958	61.8
(2) 金融機関小計 a+b+c+d+e Financial Institutions	8,054,331	53.3	4,648,133	51.3	8,992,590	51.8
a 都銀・地銀等 City & Regional Banks	839,389	5.6	421,433	4.6	1,028,610	5.9
b 信託銀行 Trust Banks	6,434,813	42.6	3,911,275	43.2	7,159,902	41.2
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	5,291,399	35.0	3,357,340	37.0	6,099,029	35.1
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	147,564	1.0	225,356	2.5	203,082	1.2
c 生命保険会社 Life Insurance Companies	415,836	2.8	134,370	1.5	394,036	2.3
d 損害保険会社 Non-life Insurance Companies	65,004	0.4	71,086	0.8	49,598	0.3
e その他の金融機関 Other Financial Institutions	299,289	2.0	109,969	1.2	360,444	2.1
(3) 証券会社 Securities Companies	307,614	2.0	124,269	1.4	421,696	2.4
(4) 事業法人等 Business Corporations	1,659,312	11.0	1,309,678	14.5	1,318,672	7.6
(6) 外国法人等 Foreigners	3,468,437	23.0	1,853,756	20.5	5,052,313	29.1
(7) 個人・その他 Individuals	1,607,710	10.6	1,127,436	12.4	1,573,738	9.1

【参考】

2 東証REIT用途別指数の構成銘柄別にみた投資部門別REIT保有金額の2期比較

2015年8月(Aug, 2015)

億円, % ¥100 mil., %

保有比率増減

ポイント, point

カテゴリー Category	オフィス指数 Office Index		住宅指数 Residential Index		商業・物流等指数 Retail & Logistics, Others Index		オフィス 指数 Office Index	住宅指数 Residential Index	商業・物流等 指数 Retail & Logistics, Others Index
銘柄数 Number of Listed Issues	21		12		17				
合計 (1)+(5)+(6)+(7) Total	44,557	100.0	15,748	100.0	35,532	100.0			
(1) 政府・地方公共団体 Govt. & Local Govt.	—	—	—	—	—	—	—	—	—
(5) 国内法人小計 (2)+(3)+(4) Domestic Corporation Subtotal	30,224	67.8	11,571	73.5	23,807	67.0	1.1	1.9	1.4
(2) 金融機関小計 a+b+c+d+e Financial Institutions	24,485	55.0	9,558	60.7	19,887	56.0	1.7	1.1	1.5
a 都銀・地銀等 City & Regional Banks	2,874	6.5	1,211	7.7	2,705	7.6	0.5	-0.1	0.1
b 信託銀行 Trust Banks	19,296	43.3	7,517	47.7	15,369	43.3	1.3	1.2	1.3
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	15,953	35.8	6,201	39.4	12,814	36.1	1.5	1.7	1.0
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	372	0.8	269	1.7	321	0.9	-0.2	-0.6	-0.2
c 生命保険会社 Life Insurance Companies	1,221	2.7	334	2.1	800	2.3	-0.2	-0.1	-0.1
d 損害保険会社 Non-life Insurance Companies	149	0.3	181	1.2	158	0.4	-0.1	-0.1	0.0
e その他の金融機関 Other Financial Institutions	944	2.1	312	2.0	854	2.4	0.1	0.1	0.1
(3) 証券会社 Securities Companies	853	1.9	231	1.5	913	2.6	-0.1	-0.3	0.1
(4) 事業法人等 Business Corporations	4,886	11.0	1,781	11.3	3,006	8.5	-0.3	1.1	-0.1
(6) 外国法人等 Foreigners	9,960	22.4	2,496	15.9	8,776	24.7	-1.1	-0.4	-1.2
(7) 個人・その他 Individuals	4,371	9.8	1,679	10.7	2,947	8.3	-0.1	-1.4	-0.1

2015年2月(Feb, 2015)

億円, % ¥100 mil., %

カテゴリー Category	オフィス指数 Office Index		住宅指数 Residential Index		商業・物流等指数 Retail & Logistics, Others Index	
銘柄数 Number of Listed Issues	20		11		15	
合計 (1)+(5)+(6)+(7) Total	49,116	100.0	17,128	100.0	40,458	100.0
(1) 政府・地方公共団体 Govt. & Local Govt.	—	—	—	—	—	—
(5) 国内法人小計 (2)+(3)+(4) Domestic Corporation Subtotal	32,736	66.7	12,258	71.6	26,545	65.6
(2) 金融機関小計 a+b+c+d+e Financial Institutions	26,185	53.3	10,212	59.6	22,066	54.5
a 都銀・地銀等 City & Regional Banks	2,953	6.0	1,334	7.8	3,017	7.5
b 信託銀行 Trust Banks	20,645	42.0	7,963	46.5	16,974	42.0
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	16,835	34.3	6,464	37.7	14,206	35.1
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	484	1.0	390	2.3	453	1.1
c 生命保険会社 Life Insurance Companies	1,414	2.9	370	2.2	953	2.4
d 損害保険会社 Non-life Insurance Companies	202	0.4	218	1.3	181	0.4
e その他の金融機関 Other Financial Institutions	969	2.0	325	1.9	939	2.3
(3) 証券会社 Securities Companies	999	2.0	306	1.8	1,000	2.5
(4) 事業法人等 Business Corporations	5,551	11.3	1,739	10.2	3,479	8.6
(6) 外国法人等 Foreigners	11,528	23.5	2,796	16.3	10,495	25.9
(7) 個人・その他 Individuals	4,851	9.9	2,073	12.1	3,416	8.4

(Outline of Survey)

1. Scope of Survey

REITs listed on stock exchanges in Japan (Tokyo, Nagoya, Fukuoka, Sapporo) as of the end of August 2015 are included. However, the survey excludes issues for which unitholder information could not be obtained due to the end of the first accounting period after listing on the exchange arriving after August 31, 2015.

2. Method of Data Collection

Data included in this survey was obtained directly via electronic means from the administrators of the unitholder registers of the REITs. The data was compiled by the administrators based on the registers as of the end of the REIT's accounting period.

3. Outline of Survey Contents

(1) Survey Data Contents

This survey was conducted on the number of investors and number of investment units held in the relevant REITs under the following investor categories based on the description in the unitholder register. Additionally, based on such data, the overall amount/ratio held by investor type, etc. was calculated based on market prices and the overall number of investors and number of investment units held by investor type. (Note)

The definition of each investor category presented in the survey is as follows:

1. Government and local government: National, prefectural, and municipal governments

2. Financial institutions

> City, regional banks, etc.: Regular Japanese banks licensed under the Banking Act and the Long-Term Credit Bank Act.

> Trust banks: Trust banks that are members of the Trust Companies Association of Japan

> Investment trusts: Trust assets of trustors that are stipulated in the Investment Trust Act (Act on Investment Trusts and Investment Corporations), and whose nominees (trustees) are banks that conduct trust business

> Annuity trusts: Employees' pension funds that are stipulated in the Employees' Pension Insurance Act, and corporate pensions stipulated in the Defined-Benefit Corporate Pension Act or the Defined Contribution Pension Act, whose nominees (trustees) are banks that conduct trust business. (excluding public pensions under management)

> Life insurance companies: Life insurance companies that are stipulated in the Insurance Business Act

> Non-life insurance companies: Non-life insurance companies that are stipulated in the Insurance Business Act

> Other financial institutions: Financial institutions other than those stipulated above, including credit unions (shinkin banks), credit associations, agriculture-related financial institutions, mutual aid associations, and government-related financial institutions, etc.

3. Securities companies: Securities companies that are financial instruments business operators as stipulated in the Financial Instruments and Exchange Act.

4. Business corporations: All companies incorporated in Japan other than those described in 2. and 3. above.

5. Foreign corporations: Corporations that were established based on foreign laws; foreign and municipal governments, and entities that are not incorporated; and individuals whose nationalities are other than Japanese, regardless of their place of residence.

6. Individuals and others: Individuals and non-incorporated groups with Japanese nationality, regardless of their place of residence.

(Note) In this survey, data is provided in terms of "Total Market Value based" and "Unit based." In order to distinguish the basis used, investor category is referred to as "investor type" for total market value-based values and as "holder type" for unit-based values. For holding ratios, the corresponding terms are "investment ratio" and "holding ratio."

(2) Date for Number of Investors and Units and Calculation Method for Number of Investors

The number of investors and units used in this survey were calculated based on the investor registers of the relevant REITs as of the last accounting period ended before August 31, 2015. Additionally, because names of investors cannot be aggregated between REITs, the number of investors is the total of those for each REIT. As such, a person that invests in 10 REITs would be counted 10 investors.

(3) Calculation Method for Amount Held and Holding Ratio by Investor Type

Calculations are performed based on 1. to 4. below.

1. Calculate the unit-based holding ratios for each REIT using data as of the end of the accounting period that is obtained from administrators of unitholder registers.

2 Calculate the amount held by investor type for each REIT as of the end of August 2015 by multiplying the unit-based holding ratio obtained in 1. by the market value of the REIT as of the end of August 2015.

3. Calculate the market capitalization by investor type for all REITs by totaling the market value for each REIT obtained in 2.

4. Calculate the investment ratio by investor type for the overall market by dividing the market value held by investor type for all REITs obtained in 3. by the total market value of all REITs.

As stand in 2. above, the market value used to calculate the total market value held by investor type for individual REITs is current as of the end of August 2015. However, because only data at the end of the accounting period of each REIT can be obtained regarding holding ratios, REITs with accounting periods ending after August 2015 are deemed to have no change in holding ratio as of the end of August 2015.