

上場不動産投資信託証券(REIT)投資主情報調査(2017年2月)資料集

REIT Investor Survey (February 2017)

表 1	所有者別投資主数 Number of Investors by Holder Type	1ページ
表 2	所有者別投資口数 Number of Investment Units by Holder Type	1
表 3	所有数別投資主数 Number of Investors by Number Held	2
表 4	所有数別投資口数 Number of Investment Units by Number Held	2
表 5	地方別投資主数 Number of Investors by Region	3
表 6	地方別投資口数 Number of Investment Units by Region	3
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	4
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	4
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	5
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	5
表 11	投資部門別REIT保有金額 REIT Holding by Investor Type	6
表 12	地方別REIT保有金額 REIT Holding by Region	6
表 13	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	7
【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	8
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	9

(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

人,% persons,%

	2016年8月 (Aug, 2016)		2017年2月 (Feb, 2017)		増減・増減率 Change・% Change		構成比増減 Change in % of Total	【参考】株式 分布状況調査 2015年度 Shareownership Survey 2015
銘柄数 Number of Listed Issues	52		57		5		ポイント point	3,613
合計 (1)+(5)+(6)+(7) Total	652,958	100.0	740,090	100.0	87,132	13.3	—	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	18,621	2.9	20,347	2.7	1,726	9.3	-0.2	1.8
(2) 金融機関小計 a+b+c+d+e Financial Institutions	5,060	0.8	5,616	0.8	556	11.0	0.0	0.2
a 都銀・地銀等 City & Regional Banks	1,407	0.2	1,538	0.2	131	9.3	0.0	0.0
b 信託銀行 Trust Banks	556	0.1	617	0.1	61	11.0	0.0	0.1
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	208	0.0	228	0.0	20	9.6	0.0	0.0
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	186	0.0	203	0.0	17	9.1	0.0	0.0
c 生命保険会社 Life Insurance Companies	272	0.0	256	0.0	-16	-5.9	0.0	0.0
d 損害保険会社 Non-life Insurance Companies	149	0.0	144	0.0	-5	-3.4	0.0	0.0
e その他の金融機関 Other Financial Institutions	2,676	0.4	3,061	0.4	385	14.4	0.0	0.0
(3) 証券会社 Securities Companies	1,183	0.2	1,200	0.2	17	1.4	0.0	0.2
(4) 事業法人等 Business Corporations	12,378	1.9	13,531	1.8	1,153	9.3	-0.1	1.5
(6) 外国法人等 Foreigners	10,124	1.6	11,096	1.5	972	9.6	-0.1	0.8
(7) 個人・その他 Individuals	624,213	95.6	708,647	95.8	84,434	13.5	0.2	97.3

表 2 所有者別投資口数

Number of Investment Units by Holder Type

口,% units,%

	2016年8月 (Aug, 2016)		2017年2月 (Feb, 2017)		増減・増減率 Change・% Change		所有比率 増減 Change in % of Total	【参考】株式 分布状況調査 2015年度 Shareownership Survey 2015
銘柄数 Number of Listed Issues	52		57		5		ポイント point	3,613
合計 (1)+(5)+(6)+(7) Total	53,296,304	100.0	58,046,715	100.0	4,750,411	8.9	—	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	34,345,579	64.4	37,195,688	64.1	2,850,109	8.3	-0.3	51.4
(2) 金融機関小計 a+b+c+d+e Financial Institutions	28,297,851	53.1	30,753,927	53.0	2,456,076	8.7	-0.1	24.8
a 都銀・地銀等 City & Regional Banks	2,934,869	5.5	3,111,239	5.4	176,370	6.0	-0.1	3.3
b 信託銀行 Trust Banks	22,811,205	42.8	24,971,909	43.0	2,160,704	9.5	0.2	16.9
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	19,092,958	35.8	20,881,201	36.0	1,788,243	9.4	0.2	4.6
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	465,114	0.9	483,875	0.8	18,761	4.0	-0.1	1.4
c 生命保険会社 Life Insurance Companies	1,050,494	2.0	979,427	1.7	-71,067	-6.8	-0.3	2.8
d 損害保険会社 Non-life Insurance Companies	282,843	0.5	289,086	0.5	6,243	2.2	0.0	1.0
e その他の金融機関 Other Financial Institutions	1,218,440	2.3	1,402,266	2.4	183,826	15.1	0.1	0.7
(3) 証券会社 Securities Companies	970,258	1.8	966,206	1.7	-4,052	-0.4	-0.1	2.3
(4) 事業法人等 Business Corporations	5,077,470	9.5	5,475,555	9.4	398,085	7.8	-0.1	24.3
(6) 外国法人等 Foreigners	13,738,659	25.8	14,753,863	25.4	1,015,204	7.4	-0.4	26.7
(7) 個人・その他 Individuals	5,212,066	9.8	6,097,164	10.5	885,098	17.0	0.7	21.7

表 3 所有数別投資主数

Number of Investors by Number Held

人,% persons, %

	2016年8月 (Aug. 2016)		2017年2月 (Feb. 2017)		増減・増減率 Change・% Change		構成比増減 Change in % of Total	【参考】株式 分布状況調査 2015年度 Shareownership Survey 2015
銘柄数 Number of Listed Issues	52		57		5		ポイント point	3,613
合計 (1)+(2)+(3) Total	652,958	100.0	740,090	100.0	87,132	13.3	—	100.0
(1) 49口以下 a+b+c 49 units or fewer	622,416	95.3	705,335	95.3	82,919	13.3	0.0	95.8
a 1口 - 4口 1 unit - 4 units	360,201	55.2	404,573	54.7	44,372	12.3	-0.5	67.3
b 5口 - 9口 5 units - 9 units	131,256	20.1	147,799	20.0	16,543	12.6	-0.1	11.0
c 10口 - 49口 10 units - 49 units	130,959	20.1	152,963	20.7	22,004	16.8	0.6	17.4
(2) 50口 - 99口 50 units - 99 units	12,804	2.0	14,748	2.0	1,944	15.2	0.0	2.0
(3) 100口以上 d+e+f+g 100 units or more	17,738	2.7	20,007	2.7	2,269	12.8	0.0	2.2
d 100口 - 499口 100 units - 499 units	11,403	1.7	13,183	1.8	1,780	15.6	0.1	1.7
e 500口 - 999口 500 units - 999 units	2,246	0.3	2,519	0.3	273	12.2	0.0	0.2
f 1000口 - 4999口 1000 units - 4999 units	2,898	0.4	3,057	0.4	159	5.5	0.0	0.2
g 5000口以上 5000 units or more	1,191	0.2	1,248	0.2	57	4.8	0.0	0.1

表 4 所有数別投資口数

Number of Investment Units by Number Held

口,% units,%

	2016年8月 (Aug. 2016)		2017年2月 (Feb. 2017)		増減・増減率 Change・% Change		構成比増減 Change in % of Total	【参考】株式 分布状況調査 2015年度 Shareownership Survey 2015
銘柄数 Number of Listed Issues	52		57		5		ポイント point	3,613
合計 (1)+(2)+(3) Total	53,296,304	100.0	58,046,715	100.0	4,750,411	8.9	—	100.0
(1) 49口以下 a+b+c 49 units or fewer	3,713,756	7.0	4,268,830	7.4	555,074	14.9	0.4	8.8
a 1口 - 4口 1 unit - 4 units	711,603	1.3	795,394	1.4	83,791	11.8	0.1	2.0
b 5口 - 9口 5 units - 9 units	772,093	1.4	875,525	1.5	103,432	13.4	0.1	1.2
c 10口 - 49口 10 units - 49 units	2,230,060	4.2	2,597,911	4.5	367,851	16.5	0.3	5.5
(2) 50口 - 99口 50 units - 99 units	813,227	1.5	939,668	1.6	126,441	15.5	0.1	2.3
(3) 100口以上 d+e+f+g 100 units or more	48,769,321	91.5	52,838,217	91.0	4,068,896	8.3	-0.5	88.9
d 100口 - 499口 100 units - 499 units	2,281,419	4.3	2,633,060	4.5	351,641	15.4	0.2	5.7
e 500口 - 999口 500 units - 999 units	1,562,582	2.9	1,742,966	3.0	180,384	11.5	0.1	2.6
f 1000口 - 4999口 1000 units - 4999 units	6,408,692	12.0	6,702,574	11.5	293,882	4.6	-0.5	9.2
g 5000口以上 5000 units or more	38,516,628	72.3	41,759,617	71.9	3,242,989	8.4	-0.4	71.4

表5 地方別投資主数

Number of Investors by Region

人,% persons,%

	2016年8月 (Aug, 2016)		2017年2月 (Feb, 2017)		増減・増減率 Change・% Change		構成比増減 Change in % of Total	【参考】株式 分布状況調査 2015年度 Shareownership Survey 2015
銘柄数 Number of Listed Issues	52		57		5		ポイント point	3,613
合 計 Total	652,958	100.0	740,090	100.0	87,132	13.3	—	100.0
北 海 道 Hokkaido	11,162	1.7	12,773	1.7	1,611	14.4	0.0	1.6
東 北 Tohoku	17,560	2.7	20,447	2.8	2,887	16.4	0.1	2.9
関 東 Kanto	314,775	48.2	355,855	48.1	41,080	13.1	-0.1	41.7
中 部 Chubu	94,268	14.4	106,684	14.4	12,416	13.2	0.0	17.9
近 畿 Kinki	127,898	19.6	145,732	19.7	17,834	13.9	0.1	22.6
中 国 Chugoku	26,572	4.1	30,254	4.1	3,682	13.9	0.0	4.8
四 国 Shikoku	17,234	2.6	19,395	2.6	2,161	12.5	0.0	2.6
九 州 Kyushu	33,643	5.2	38,237	5.2	4,594	13.7	0.0	5.1
海 外 Overseas	9,846	1.5	10,713	1.4	867	8.8	-0.1	0.8

表6 地方別投資口数

Number of Investment Units by Region

口,% units,%

	2016年8月 (Aug, 2016)		2017年2月 (Feb, 2017)		増減・増減率 Change・% Change		構成比増減 Change in % of Total	【参考】株式 分布状況調査 2015年度 Shareownership Survey 2015
銘柄数 Number of Listed Issues	52		57		5		ポイント point	3,613
合 計 Total	53,296,304	100.0	58,046,715	100.0	4,750,411	8.9	—	100.0
北 海 道 Hokkaido	135,714	0.3	164,656	0.3	28,942	21.3	0.0	0.4
東 北 Tohoku	462,328	0.9	543,775	0.9	81,447	17.6	0.0	0.8
関 東 Kanto	32,809,644	61.6	35,711,844	61.5	2,902,200	8.8	-0.1	54.1
中 部 Chubu	2,084,525	3.9	2,359,863	4.1	275,338	13.2	0.2	6.4
近 畿 Kinki	2,189,439	4.1	2,465,652	4.2	276,213	12.6	0.1	8.0
中 国 Chugoku	647,657	1.2	700,449	1.2	52,792	8.2	0.0	1.3
四 国 Shikoku	570,069	1.1	618,940	1.1	48,871	8.6	0.0	0.9
九 州 Kyushu	679,808	1.3	752,116	1.3	72,308	10.6	0.0	1.5
海 外 Overseas	13,717,120	25.7	14,729,420	25.4	1,012,300	7.4	-0.3	26.6

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	57		22		12		23	
合計 (1)+(5)+(6)+(7) Total	740,090	100.0	318,010	100.0	142,586	100.0	279,494	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	20,347	2.7	8,623	2.7	3,447	2.4	8,277	3.0
(2) 金融機関小計 a+b+c+d+e Financial Institutions	5,616	0.8	2,322	0.7	945	0.7	2,349	0.8
a 都銀・地銀等 City & Regional Banks	1,538	0.2	618	0.2	266	0.2	654	0.2
b 信託銀行 Trust Banks	617	0.1	249	0.1	128	0.1	240	0.1
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	228	0.0	88	0.0	48	0.0	92	0.0
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	203	0.0	85	0.0	40	0.0	78	0.0
c 生命保険会社 Life Insurance Companies	256	0.0	106	0.0	42	0.0	108	0.0
d 損害保険会社 Non-life Insurance Companies	144	0.0	66	0.0	28	0.0	50	0.0
e その他の金融機関 Other Financial Institutions	3,061	0.4	1,283	0.4	481	0.3	1,297	0.5
(3) 証券会社 Securities Companies	1,200	0.2	455	0.1	248	0.2	497	0.2
(4) 事業法人等 Business Corporations	13,531	1.8	5,846	1.8	2,254	1.6	5,431	1.9
(6) 外国法人等 Foreigners	11,096	1.5	4,849	1.5	1,823	1.3	4,424	1.6
(7) 個人・その他 Individuals	708,647	95.8	304,538	95.8	137,316	96.3	266,793	95.5

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	57		22		12		23	
合計 (1)+(5)+(6)+(7) Total	58,046,715	100.0	23,786,521	100.0	8,598,157	100.0	25,662,037	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	37,195,688	64.1	15,558,307	65.4	5,949,739	69.2	15,687,642	61.1
(2) 金融機関小計 a+b+c+d+e Financial Institutions	30,753,927	53.0	12,935,526	54.4	5,046,645	58.7	12,771,756	49.8
a 都銀・地銀等 City & Regional Banks	3,111,239	5.4	1,178,285	5.0	567,953	6.6	1,365,001	5.3
b 信託銀行 Trust Banks	24,971,909	43.0	10,608,876	44.6	3,992,949	46.4	10,370,084	40.4
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	20,881,201	36.0	8,791,601	37.0	3,326,475	38.7	8,763,125	34.1
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	483,875	0.8	184,088	0.8	97,158	1.1	202,629	0.8
c 生命保険会社 Life Insurance Companies	979,427	1.7	439,193	1.8	163,068	1.9	377,166	1.5
d 損害保険会社 Non-life Insurance Companies	289,086	0.5	114,854	0.5	96,443	1.1	77,789	0.3
e その他の金融機関 Other Financial Institutions	1,402,266	2.4	594,318	2.5	226,232	2.6	581,716	2.3
(3) 証券会社 Securities Companies	966,206	1.7	404,319	1.7	108,019	1.3	453,868	1.8
(4) 事業法人等 Business Corporations	5,475,555	9.4	2,218,462	9.3	795,075	9.2	2,462,018	9.6
(6) 外国法人等 Foreigners	14,753,863	25.4	5,605,518	23.6	1,546,381	18.0	7,601,964	29.6
(7) 個人・その他 Individuals	6,097,164	10.5	2,622,696	11.0	1,102,037	12.8	2,372,431	9.2

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	57		22		12		23	
合計 (1)+(2)+(3) Total	740,090	100.0	318,010	100.0	142,586	100.0	279,494	100.0
(1) 49口以下 a+b+c 49 units or fewer	705,335	95.3	302,895	95.2	136,841	96.0	265,599	95.0
a 1口 - 4口 1 unit - 4 units	404,573	54.7	166,361	52.3	85,992	60.3	152,220	54.5
b 5口 - 9口 5 units - 9 units	147,799	20.0	68,809	21.6	25,061	17.6	53,929	19.3
c 10口 - 49口 10 units - 49 units	152,963	20.7	67,725	21.3	25,788	18.1	59,450	21.3
(2) 50口 - 99口 50 units - 99 units	14,748	2.0	6,559	2.1	2,540	1.8	5,649	2.0
(3) 100口以上 d+e+f+g 100 units or more	20,007	2.7	8,556	2.7	3,205	2.2	8,246	3.0
d 100口 - 499口 100 units - 499 units	13,183	1.8	5,708	1.8	2,168	1.5	5,307	1.9
e 500口 - 999口 500 units - 999 units	2,519	0.3	1,110	0.3	385	0.3	1,024	0.4
f 1000口 - 4999口 1000 units - 4999 units	3,057	0.4	1,259	0.4	446	0.3	1,352	0.5
g 5000口以上 5000 units or more	1,248	0.2	479	0.2	206	0.1	563	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	57		22		12		23	
合計 (1)+(2)+(3) Total	58,046,715	100.0	23,786,521	100.0	8,598,157	100.0	25,662,037	100.0
(1) 49口以下 a+b+c 49 units or fewer	4,268,830	7.4	1,873,883	7.9	788,442	9.2	1,606,505	6.3
a 1口 - 4口 1 unit - 4 units	795,394	1.4	327,436	1.4	179,344	2.1	288,614	1.1
b 5口 - 9口 5 units - 9 units	875,525	1.5	401,500	1.7	156,202	1.8	317,823	1.2
c 10口 - 49口 10 units - 49 units	2,597,911	4.5	1,144,947	4.8	452,896	5.3	1,000,068	3.9
(2) 50口 - 99口 50 units - 99 units	939,668	1.6	414,445	1.7	164,494	1.9	360,729	1.4
(3) 100口以上 d+e+f+g 100 units or more	52,838,217	91.0	21,498,193	90.4	7,645,221	88.9	23,694,803	92.3
d 100口 - 499口 100 units - 499 units	2,633,060	4.5	1,123,411	4.7	442,596	5.1	1,067,053	4.2
e 500口 - 999口 500 units - 999 units	1,742,966	3.0	769,166	3.2	269,474	3.1	704,326	2.7
f 1000口 - 4999口 1000 units - 4999 units	6,702,574	11.5	2,735,450	11.5	986,733	11.5	2,980,391	11.6
g 5000口以上 5000 units or more	41,759,617	71.9	16,870,166	70.9	5,946,418	69.2	18,943,033	73.8

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

億円,% ¥100 mil.,%

	2016年8月 (Aug. 2016)		2017年2月 (Feb. 2017)		増減・増減率 Change・% Change		保有比率 増減 Change in % of Total	【参考】株式 分布状況調査 2015年度 Shareownership Survey 2015
銘柄数 Number of Listed Issues	52		57		5		ポイント point	3,613
合計 (1)+(5)+(6)+(7) Total	115,557	100.0	120,070	100.0	4,513	3.9	—	100.0
(1) 政府・地方公共団体 Govt. & Local Govt.	—	—	—	—	—	—	—	0.1
(5) 国内法人小計 (2)+(3)+(4) Domestic Corporation Subtotal	76,924	66.6	80,239	66.8	3,315	4.3	0.2	52.6
(2) 金融機関小計 a+b+c+d+e Financial Institutions	64,256	55.6	67,395	56.1	3,139	4.9	0.5	27.9
a 都銀・地銀等 City & Regional Banks	7,807	6.8	8,094	6.7	287	3.7	-0.1	3.7
b 信託銀行 Trust Banks	50,192	43.4	53,041	44.2	2,849	5.7	0.8	18.8
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	40,871	35.4	43,118	35.9	2,247	5.5	0.5	5.6
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	1,034	0.9	1,086	0.9	52	5.0	0.0	1.5
c 生命保険会社 Life Insurance Companies	2,775	2.4	2,528	2.1	-247	-8.9	-0.3	3.4
d 損害保険会社 Non-life Insurance Companies	684	0.6	672	0.6	-12	-1.8	0.0	1.3
e その他の金融機関 Other Financial Institutions	2,796	2.4	3,058	2.5	262	9.4	0.1	0.7
(3) 証券会社 Securities Companies	2,089	1.8	1,939	1.6	-150	-7.2	-0.2	2.1
(4) 事業法人等 Business Corporations	10,578	9.2	10,905	9.1	327	3.1	-0.1	22.6
(6) 外国法人等 Foreigners	28,858	25.0	29,406	24.5	548	1.9	-0.5	29.8
(7) 個人・その他 Individuals	9,774	8.5	10,424	8.7	650	6.7	0.2	17.5

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

億円,% ¥100 mil.,%

	2016年8月 (Aug. 2016)		2017年2月 (Feb. 2017)		増減・増減率 Change・% Change		構成比増減 Change in % of Total	【参考】株式 分布状況調査 2015年度 Shareownership Survey 2015
銘柄数 Number of Listed Issues	52		57		5		ポイント point	3,613
合 計 Total	115,557	100.0	120,070	100.0	4,513	3.9	—	100.0
北 海 道 Hokkaido	303	0.3	338	0.3	35	11.6	0.0	0.4
東 北 Tohoku	999	0.9	1,104	0.9	105	10.5	0.0	0.6
関 東 Kanto	71,461	61.8	74,763	62.3	3,302	4.6	0.5	52.1
中 部 Chubu	4,730	4.1	5,100	4.2	370	7.8	0.1	6.8
近 畿 Kinki	4,805	4.2	4,833	4.0	28	0.6	-0.2	7.5
中 国 Chugoku	1,772	1.5	1,785	1.5	13	0.7	0.0	1.1
四 国 Shikoku	1,255	1.1	1,309	1.1	54	4.3	0.0	0.8
九 州 Kyushu	1,433	1.2	1,491	1.2	58	4.0	0.0	1.1
海 外 Overseas	28,796	24.9	29,342	24.4	546	1.9	-0.5	29.7

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	57		22		12		23	
合計 (1)+(5)+(6)+(7) Total	120,070	100.0	57,513	100.0	18,005	100.0	44,551	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	80,239	66.8	38,473	66.9	13,182	73.2	28,584	64.2
(2) 金融機関小計 a+b+c+d+e Financial Institutions	67,395	56.1	32,164	55.9	11,331	62.9	23,899	53.6
a 都銀・地銀等 City & Regional Banks	8,094	6.7	3,365	5.9	1,516	8.4	3,212	7.2
b 信託銀行 Trust Banks	53,041	44.2	25,794	44.8	8,735	48.5	18,511	41.6
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	43,118	35.9	21,061	36.6	6,927	38.5	15,129	34.0
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	1,086	0.9	469	0.8	245	1.4	371	0.8
c 生命保険会社 Life Insurance Companies	2,528	2.1	1,363	2.4	365	2.0	799	1.8
d 損害保険会社 Non-life Insurance Companies	672	0.6	259	0.5	228	1.3	185	0.4
e その他の金融機関 Other Financial Institutions	3,058	2.5	1,381	2.4	485	2.7	1,190	2.7
(3) 証券会社 Securities Companies	1,939	1.6	864	1.5	258	1.4	816	1.8
(4) 事業法人等 Business Corporations	10,905	9.1	5,444	9.5	1,592	8.8	3,868	8.7
(6) 外国法人等 Foreigners	29,406	24.5	14,102	24.5	3,019	16.8	12,284	27.6
(7) 個人・その他 Individuals	10,424	8.7	4,938	8.6	1,803	10.0	3,682	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

2017年2月 (Feb, 2017)

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	22		12		23				
合計 (1)+(5)+(6)+(7) Total	23,786,521	100.0	8,598,157	100.0	25,662,037	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	15,558,307	65.4	5,949,739	69.2	15,687,642	61.1	-1.2	1.3	-0.2
(2) 金融機関小計 a+b+c+d+e Financial Institutions	12,935,526	54.4	5,046,645	58.7	12,771,756	49.8	-0.5	0.8	0.0
a 都銀・地銀等 City & Regional Banks	1,178,285	5.0	567,953	6.6	1,365,001	5.3	-0.1	0.1	-0.3
b 信託銀行 Trust Banks	10,608,876	44.6	3,992,949	46.4	10,370,084	40.4	-0.2	0.8	0.4
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	8,791,601	37.0	3,326,475	38.7	8,763,125	34.1	-0.3	0.9	0.3
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	184,088	0.8	97,158	1.1	202,629	0.8	0.0	-0.1	-0.1
c 生命保険会社 Life Insurance Companies	439,193	1.8	163,068	1.9	377,166	1.5	-0.3	-0.1	-0.3
d 損害保険会社 Non-life Insurance Companies	114,854	0.5	96,443	1.1	77,789	0.3	0.0	-0.1	0.0
e その他の金融機関 Other Financial Institutions	594,318	2.5	226,232	2.6	581,716	2.3	0.1	0.0	0.2
(3) 証券会社 Securities Companies	404,319	1.7	108,019	1.3	453,868	1.8	0.0	-0.1	-0.3
(4) 事業法人等 Business Corporations	2,218,462	9.3	795,075	9.2	2,462,018	9.6	-0.7	0.5	0.3
(6) 外国法人等 Foreigners	5,605,518	23.6	1,546,381	18.0	7,601,964	29.6	0.4	-1.1	-0.8
(7) 個人・その他 Individuals	2,622,696	11.0	1,102,037	12.8	2,372,431	9.2	0.8	-0.1	0.8

2016年8月 (Aug, 2016)

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	21		11		20	
合計 (1)+(5)+(6)+(7) Total	22,237,131	100.0	7,565,989	100.0	23,493,184	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	14,815,329	66.6	5,139,718	67.9	14,390,532	61.3
(2) 金融機関小計 a+b+c+d+e Financial Institutions	12,211,144	54.9	4,378,763	57.9	11,707,944	49.8
a 都銀・地銀等 City & Regional Banks	1,131,255	5.1	495,069	6.5	1,308,545	5.6
b 信託銀行 Trust Banks	9,973,184	44.8	3,446,741	45.6	9,391,280	40.0
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	8,301,979	37.3	2,859,402	37.8	7,931,577	33.8
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	174,085	0.8	87,053	1.2	203,976	0.9
c 生命保険会社 Life Insurance Companies	469,212	2.1	152,970	2.0	428,312	1.8
d 損害保険会社 Non-life Insurance Companies	113,332	0.5	89,099	1.2	80,412	0.3
e その他の金融機関 Other Financial Institutions	524,161	2.4	194,884	2.6	499,395	2.1
(3) 証券会社 Securities Companies	378,436	1.7	102,578	1.4	489,244	2.1
(4) 事業法人等 Business Corporations	2,225,749	10.0	658,377	8.7	2,193,344	9.3
(6) 外国法人等 Foreigners	5,159,598	23.2	1,448,706	19.1	7,130,355	30.4
(7) 個人・その他 Individuals	2,262,204	10.2	977,565	12.9	1,972,297	8.4

【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

2017年2月 (Feb, 2017)

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	22		12		23				
合計 (1)+(5)+(6)+(7) Total	57,513	100.0	18,005	100.0	44,551	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	38,473	66.9	13,182	73.2	28,584	64.2	-0.3	0.5	0.8
(2) 金融機関小計 a+b+c+d+e Financial Institutions	32,164	55.9	11,331	62.9	23,899	53.6	0.4	0.0	0.6
a 都銀・地銀等 City & Regional Banks	3,365	5.9	1,516	8.4	3,212	7.2	0.0	-0.3	0.1
b 信託銀行 Trust Banks	25,794	44.8	8,735	48.5	18,511	41.6	0.5	1.1	0.8
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	21,061	36.6	6,927	38.5	15,129	34.0	0.2	1.7	0.5
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	469	0.8	245	1.4	371	0.8	0.0	0.1	0.0
c 生命保険会社 Life Insurance Companies	1,363	2.4	365	2.0	799	1.8	-0.2	-0.6	-0.3
d 損害保険会社 Non-life Insurance Companies	259	0.5	228	1.3	185	0.4	0.0	-0.1	0.0
e その他の金融機関 Other Financial Institutions	1,381	2.4	485	2.7	1,190	2.7	0.1	-0.1	0.2
(3) 証券会社 Securities Companies	864	1.5	258	1.4	816	1.8	-0.2	0.2	-0.4
(4) 事業法人等 Business Corporations	5,444	9.5	1,592	8.8	3,868	8.7	-0.5	0.2	0.5
(6) 外国法人等 Foreigners	14,102	24.5	3,019	16.8	12,284	27.6	0.1	-0.4	-1.1
(7) 個人・その他 Individuals	4,938	8.6	1,803	10.0	3,682	8.3	0.2	-0.1	0.4

2016年8月 (Aug, 2016)

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	21		11		20	
合計 (1)+(5)+(6)+(7) Total	56,512	100.0	16,524	100.0	42,520	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	37,962	67.2	12,011	72.7	26,950	63.4
(2) 金融機関小計 a+b+c+d+e Financial Institutions	31,343	55.5	10,386	62.9	22,527	53.0
a 都銀・地銀等 City & Regional Banks	3,334	5.9	1,437	8.7	3,036	7.1
b 信託銀行 Trust Banks	25,028	44.3	7,832	47.4	17,331	40.8
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	20,549	36.4	6,076	36.8	14,245	33.5
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	457	0.8	221	1.3	355	0.8
c 生命保険会社 Life Insurance Companies	1,444	2.6	424	2.6	905	2.1
d 損害保険会社 Non-life Insurance Companies	262	0.5	234	1.4	188	0.4
e その他の金融機関 Other Financial Institutions	1,273	2.3	457	2.8	1,065	2.5
(3) 証券会社 Securities Companies	964	1.7	196	1.2	928	2.2
(4) 事業法人等 Business Corporations	5,654	10.0	1,428	8.6	3,495	8.2
(6) 外国法人等 Foreigners	13,805	24.4	2,839	17.2	12,213	28.7
(7) 個人・その他 Individuals	4,744	8.4	1,673	10.1	3,356	7.9

(Outline of Survey)

1. Scope of Survey

REITs listed on stock exchanges in Japan (Tokyo, Nagoya, Fukuoka, Sapporo) as of the end of February 2017 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 February 28, 2017.

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 February 28, 2017. 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 February 2017 by multiplying the unit-based holding ratio obtained in 1. by the market value of the REIT as of the end of February 2017.

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 February 2017. 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 February 2017 are deemed to have no change in holding ratio as of the end of February 2017.