

上場不動産投資信託証券(REIT)投資主情報調査(2016年8月)資料集

REIT Investor Survey (August 2016)

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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

人,% persons,%

	2016年2月 (Feb, 2016)		2016年8月 (Aug, 2016)		増減・増減率 Change・% Change		構成比増減 Change in % of Total	株式分布状況調査 2015年度 Shareownership Survey 2015
銘柄数 Number of Listed Issues	52		52		0		ポイント point	3,613
合計 (1)+(5)+(6)+(7) Total	650,246	100.0	652,958	100.0	2,712	0.4	—	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	18,273	2.8	18,621	2.9	348	1.9	0.1	1.8
(2) 金融機関小計 a+b+c+d+e Financial Institutions	4,841	0.7	5,060	0.8	219	4.5	0.1	0.2
a 都銀・地銀等 City & Regional Banks	1,371	0.2	1,407	0.2	36	2.6	0.0	0.0
b 信託銀行 Trust Banks	537	0.1	556	0.1	19	3.5	0.0	0.1
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	208	0.0	208	0.0	0	0.0	0.0	0.0
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	175	0.0	186	0.0	11	6.3	0.0	0.0
c 生命保険会社 Life Insurance Companies	276	0.0	272	0.0	-4	-1.4	0.0	0.0
d 損害保険会社 Non-life Insurance Companies	121	0.0	149	0.0	28	23.1	0.0	0.0
e その他の金融機関 Other Financial Institutions	2,536	0.4	2,676	0.4	140	5.5	0.0	0.0
(3) 証券会社 Securities Companies	1,100	0.2	1,183	0.2	83	7.5	0.0	0.2
(4) 事業法人等 Business Corporations	12,332	1.9	12,378	1.9	46	0.4	0.0	1.5
(6) 外国法人等 Foreigners	9,558	1.5	10,124	1.6	566	5.9	0.1	0.8
(7) 個人・その他 Individuals	622,415	95.7	624,213	95.6	1,798	0.3	-0.1	97.3

表 2 所有者別投資口数

Number of Investment Units by Holder Type

口,% units,%

	2016年2月 (Feb, 2016)		2016年8月 (Aug, 2016)		増減・増減率 Change・% Change		所有比率 増減 Change in % of Total	株式分布状況調査 2015年度 Shareownership Survey 2015
銘柄数 Number of Listed Issues	52		52		0		ポイント point	3,613
合計 (1)+(5)+(6)+(7) Total	49,704,440	100.0	53,296,304	100.0	3,591,864	7.2	—	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	33,069,363	66.5	34,345,579	64.4	1,276,216	3.9	-2.1	51.4
(2) 金融機関小計 a+b+c+d+e Financial Institutions	27,316,331	55.0	28,297,851	53.1	981,520	3.6	-1.9	24.8
a 都銀・地銀等 City & Regional Banks	2,794,737	5.6	2,934,869	5.5	140,132	5.0	-0.1	3.3
b 信託銀行 Trust Banks	22,235,646	44.7	22,811,205	42.8	575,559	2.6	-1.9	16.9
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	18,707,867	37.6	19,092,958	35.8	385,091	2.1	-1.8	4.6
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	477,692	1.0	465,114	0.9	-12,578	-2.6	-0.1	1.4
c 生命保険会社 Life Insurance Companies	1,026,702	2.1	1,050,494	2.0	23,792	2.3	-0.1	2.8
d 損害保険会社 Non-life Insurance Companies	234,527	0.5	282,843	0.5	48,316	20.6	0.0	1.0
e その他の金融機関 Other Financial Institutions	1,024,719	2.1	1,218,440	2.3	193,721	18.9	0.2	0.7
(3) 証券会社 Securities Companies	890,648	1.8	970,258	1.8	79,610	8.9	0.0	2.3
(4) 事業法人等 Business Corporations	4,862,384	9.8	5,077,470	9.5	215,086	4.4	-0.3	24.3
(6) 外国法人等 Foreigners	11,628,536	23.4	13,738,659	25.8	2,110,123	18.1	2.4	26.7
(7) 個人・その他 Individuals	5,006,541	10.1	5,212,066	9.8	205,525	4.1	-0.3	21.7

表 3 所有数別投資主数

Number of Investors by Number Held

	2016年2月 (Feb, 2016)		2016年8月 (Aug, 2016)		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 2015年度 Shareownership Survey 2015
銘柄数 Number of Listed Issues	52		52		0		ポイント point	3,613
合計 (1)+(2)+(3) Total	650,246	100.0	652,958	100.0	2,712	0.4	—	100.0
(1) 49口以下 a+b+c 49 units or fewer	621,896	95.6	622,416	95.3	520	0.1	-0.3	95.8
a 1口 - 4口 1 unit - 4 units	370,791	57.0	360,201	55.2	-10,590	-2.9	-1.8	67.3
b 5口 - 9口 5 units - 9 units	125,945	19.4	131,256	20.1	5,311	4.2	0.7	11.0
c 10口 - 49口 10 units - 49 units	125,160	19.2	130,959	20.1	5,799	4.6	0.9	17.4
(2) 50口 - 99口 50 units - 99 units	12,083	1.9	12,804	2.0	721	6.0	0.1	2.0
(3) 100口以上 d+e+f+g 100 units or more	16,267	2.5	17,738	2.7	1,471	9.0	0.2	2.2
d 100口 - 499口 100 units - 499 units	10,597	1.6	11,403	1.7	806	7.6	0.1	1.7
e 500口 - 999口 500 units - 999 units	1,995	0.3	2,246	0.3	251	12.6	0.0	0.2
f 1000口 - 4999口 1000 units - 4999 units	2,600	0.4	2,898	0.4	298	11.5	0.0	0.2
g 5000口以上 5000 units or more	1,075	0.2	1,191	0.2	116	10.8	0.0	0.1

表 4 所有数別投資口数

Number of Investment Units by Number Held

	2016年2月 (Feb, 2016)		2016年8月 (Aug, 2016)		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 2015年度 Shareownership Survey 2015
銘柄数 Number of Listed Issues	52		52		0		ポイント point	3,613
合計 (1)+(2)+(3) Total	49,704,440	100.0	53,296,304	100.0	3,591,864	7.2	—	100.0
(1) 49口以下 a+b+c 49 units or fewer	3,624,076	7.3	3,713,756	7.0	89,680	2.5	-0.3	8.8
a 1口 - 4口 1 unit - 4 units	732,158	1.5	711,603	1.3	-20,555	-2.8	-0.2	2.0
b 5口 - 9口 5 units - 9 units	746,007	1.5	772,093	1.4	26,086	3.5	-0.1	1.2
c 10口 - 49口 10 units - 49 units	2,145,911	4.3	2,230,060	4.2	84,149	3.9	-0.1	5.5
(2) 50口 - 99口 50 units - 99 units	769,333	1.5	813,227	1.5	43,894	5.7	0.0	2.3
(3) 100口以上 d+e+f+g 100 units or more	45,311,031	91.2	48,769,321	91.5	3,458,290	7.6	0.3	88.9
d 100口 - 499口 100 units - 499 units	2,134,645	4.3	2,281,419	4.3	146,774	6.9	0.0	5.7
e 500口 - 999口 500 units - 999 units	1,398,102	2.8	1,562,582	2.9	164,480	11.8	0.1	2.6
f 1000口 - 4999口 1000 units - 4999 units	5,692,515	11.5	6,408,692	12.0	716,177	12.6	0.5	9.2
g 5000口以上 5000 units or more	36,085,769	72.6	38,516,628	72.3	2,430,859	6.7	-0.3	71.4

表5 地方別投資主数

Number of Investors by Region

人,% persons,%

	2016年2月 (Feb, 2016)		2016年8月 (Aug, 2016)		増減・増減率 Change・% Change		構成比増減 Change in % of Total	株式分布状況調査 2015年度 Shareownership Survey 2015
銘柄数 Number of Listed Issues	52		52		0		ポイント point	3,613
合 計 Total	650,246	100.0	652,958	100.0	2,712	0.4	—	100.0
北 海 道 Hokkaido	10,990	1.7	11,162	1.7	172	1.6	0.0	1.6
東 北 Tohoku	17,322	2.7	17,560	2.7	238	1.4	0.0	2.9
関 東 Kanto	314,077	48.3	314,775	48.2	698	0.2	-0.1	41.7
中 部 Chubu	94,491	14.5	94,268	14.4	-223	-0.2	-0.1	17.9
近 畿 Kinki	127,540	19.6	127,898	19.6	358	0.3	0.0	22.6
中 国 Chugoku	26,165	4.0	26,572	4.1	407	1.6	0.1	4.8
四 国 Shikoku	16,912	2.6	17,234	2.6	322	1.9	0.0	2.6
九 州 Kyushu	33,501	5.2	33,643	5.2	142	0.4	0.0	5.1
海 外 Overseas	9,248	1.4	9,846	1.5	598	6.5	0.1	0.8

表6 地方別投資口数

Number of Investment Units by Region

口,% units,%

	2016年2月 (Feb, 2016)		2016年8月 (Aug, 2016)		増減・増減率 Change・% Change		構成比増減 Change in % of Total	株式分布状況調査 2015年度 Shareownership Survey 2015
銘柄数 Number of Listed Issues	52		52		0		ポイント point	3,613
合 計 Total	49,704,440	100.0	53,296,304	100.0	3,591,864	7.2	—	100.0
北 海 道 Hokkaido	132,001	0.3	135,714	0.3	3,713	2.8	0.0	0.4
東 北 Tohoku	407,276	0.8	462,328	0.9	55,052	13.5	0.1	0.8
関 東 Kanto	31,745,701	63.9	32,809,644	61.6	1,063,943	3.4	-2.3	54.1
中 部 Chubu	1,890,955	3.8	2,084,525	3.9	193,570	10.2	0.1	6.4
近 畿 Kinki	2,095,537	4.2	2,189,439	4.1	93,902	4.5	-0.1	8.0
中 国 Chugoku	633,683	1.3	647,657	1.2	13,974	2.2	-0.1	1.3
四 国 Shikoku	533,850	1.1	570,069	1.1	36,219	6.8	0.0	0.9
九 州 Kyushu	657,061	1.3	679,808	1.3	22,747	3.5	0.0	1.5
海 外 Overseas	11,608,376	23.4	13,717,120	25.7	2,108,744	18.2	2.3	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	52		21		11		20	
合計 (1)+(5)+(6)+(7) Total	652,958	100.0	287,941	100.0	130,475	100.0	234,542	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	18,621	2.9	8,278	2.9	3,166	2.4	7,177	3.1
(2) 金融機関小計 a+b+c+d+e Financial Institutions	5,060	0.8	2,182	0.8	857	0.7	2,021	0.9
a 都銀・地銀等 City & Regional Banks	1,407	0.2	583	0.2	245	0.2	579	0.2
b 信託銀行 Trust Banks	556	0.1	230	0.1	116	0.1	210	0.1
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	208	0.0	84	0.0	44	0.0	80	0.0
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	186	0.0	80	0.0	36	0.0	70	0.0
c 生命保険会社 Life Insurance Companies	272	0.0	114	0.0	45	0.0	113	0.0
d 損害保険会社 Non-life Insurance Companies	149	0.0	70	0.0	27	0.0	52	0.0
e その他の金融機関 Other Financial Institutions	2,676	0.4	1,185	0.4	424	0.3	1,067	0.5
(3) 証券会社 Securities Companies	1,183	0.2	482	0.2	240	0.2	461	0.2
(4) 事業法人等 Business Corporations	12,378	1.9	5,614	1.9	2,069	1.6	4,695	2.0
(6) 外国法人等 Foreigners	10,124	1.6	4,548	1.6	1,610	1.2	3,966	1.7
(7) 個人・その他 Individuals	624,213	95.6	275,115	95.5	125,699	96.3	223,399	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	52		21		11		20	
合計 (1)+(5)+(6)+(7) Total	53,296,304	100.0	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	34,345,579	64.4	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	28,297,851	53.1	12,211,144	54.9	4,378,763	57.9	11,707,944	49.8
a 都銀・地銀等 City & Regional Banks	2,934,869	5.5	1,131,255	5.1	495,069	6.5	1,308,545	5.6
b 信託銀行 Trust Banks	22,811,205	42.8	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)	19,092,958	35.8	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)	465,114	0.9	174,085	0.8	87,053	1.2	203,976	0.9
c 生命保険会社 Life Insurance Companies	1,050,494	2.0	469,212	2.1	152,970	2.0	428,312	1.8
d 損害保険会社 Non-life Insurance Companies	282,843	0.5	113,332	0.5	89,099	1.2	80,412	0.3
e その他の金融機関 Other Financial Institutions	1,218,440	2.3	524,161	2.4	194,884	2.6	499,395	2.1
(3) 証券会社 Securities Companies	970,258	1.8	378,436	1.7	102,578	1.4	489,244	2.1
(4) 事業法人等 Business Corporations	5,077,470	9.5	2,225,749	10.0	658,377	8.7	2,193,344	9.3
(6) 外国法人等 Foreigners	13,738,659	25.8	5,159,598	23.2	1,448,706	19.1	7,130,355	30.4
(7) 個人・その他 Individuals	5,212,066	9.8	2,262,204	10.2	977,565	12.9	1,972,297	8.4

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

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	52		21		11		20	
合計 (1)+(2)+(3) Total	652,958	100.0	287,941	100.0	130,475	100.0	234,542	100.0
(1) 49口以下 a+b+c 49 units or fewer	622,416	95.3	274,367	95.3	125,366	96.1	222,683	94.9
a 1口 - 4口 1 unit - 4 units	360,201	55.2	153,016	53.1	80,005	61.3	127,180	54.2
b 5口 - 9口 5 units - 9 units	131,256	20.1	62,748	21.8	22,652	17.4	45,856	19.6
c 10口 - 49口 10 units - 49 units	130,959	20.1	58,603	20.4	22,709	17.4	49,647	21.2
(2) 50口 - 99口 50 units - 99 units	12,804	2.0	5,833	2.0	2,261	1.7	4,710	2.0
(3) 100口以上 d+e+f+g 100 units or more	17,738	2.7	7,741	2.7	2,848	2.2	7,149	3.0
d 100口 - 499口 100 units - 499 units	11,403	1.7	5,083	1.8	1,875	1.4	4,445	1.9
e 500口 - 999口 500 units - 999 units	2,246	0.3	987	0.3	344	0.3	915	0.4
f 1000口 - 4999口 1000 units - 4999 units	2,898	0.4	1,208	0.4	440	0.3	1,250	0.5
g 5000口以上 5000 units or more	1,191	0.2	463	0.2	189	0.1	539	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	52		21		11		20	
合計 (1)+(2)+(3) Total	53,296,304	100.0	22,237,131	100.0	7,565,989	100.0	23,493,184	100.0
(1) 49口以下 a+b+c 49 units or fewer	3,713,756	7.0	1,660,351	7.5	708,858	9.4	1,344,547	5.7
a 1口 - 4口 1 unit - 4 units	711,603	1.3	301,852	1.4	166,586	2.2	243,165	1.0
b 5口 - 9口 5 units - 9 units	772,093	1.4	364,566	1.6	140,693	1.9	266,834	1.1
c 10口 - 49口 10 units - 49 units	2,230,060	4.2	993,933	4.5	401,579	5.3	834,548	3.6
(2) 50口 - 99口 50 units - 99 units	813,227	1.5	368,454	1.7	145,988	1.9	298,785	1.3
(3) 100口以上 d+e+f+g 100 units or more	48,769,321	91.5	20,208,326	90.9	6,711,143	88.7	21,849,852	93.0
d 100口 - 499口 100 units - 499 units	2,281,419	4.3	1,006,749	4.5	377,513	5.0	897,157	3.8
e 500口 - 999口 500 units - 999 units	1,562,582	2.9	686,397	3.1	236,336	3.1	639,849	2.7
f 1000口 - 4999口 1000 units - 4999 units	6,408,692	12.0	2,632,652	11.8	963,909	12.7	2,812,131	12.0
g 5000口以上 5000 units or more	38,516,628	72.3	15,882,528	71.4	5,133,385	67.8	17,500,715	74.5

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

億円,% ¥100 mil.,%

	2016年2月 (Feb, 2016)		2016年8月 (Aug, 2016)		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 2015年度 Shareownership Survey 2015
銘柄数 Number of Listed Issues	52		52		0		ポイント point	3,613
合計 (1)+(5)+(6)+(7) Total	114,047	100.0	115,557	100.0	1,510	1.3	—	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	78,347	68.7	76,924	66.6	-1,423	-1.8	-2.1	52.6
(2) 金融機関小計 a+b+c+d+e Financial Institutions	65,294	57.3	64,256	55.6	-1,038	-1.6	-1.7	27.9
a 都銀・地銀等 City & Regional Banks	7,767	6.8	7,807	6.8	40	0.5	0.0	3.7
b 信託銀行 Trust Banks	51,669	45.3	50,192	43.4	-1,477	-2.9	-1.9	18.8
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	42,801	37.5	40,871	35.4	-1,930	-4.5	-2.1	5.6
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	1,075	0.9	1,034	0.9	-41	-3.8	0.0	1.5
c 生命保険会社 Life Insurance Companies	2,766	2.4	2,775	2.4	9	0.3	0.0	3.4
d 損害保険会社 Non-life Insurance Companies	571	0.5	684	0.6	113	19.8	0.1	1.3
e その他の金融機関 Other Financial Institutions	2,521	2.2	2,796	2.4	275	10.9	0.2	0.7
(3) 証券会社 Securities Companies	2,120	1.9	2,089	1.8	-31	-1.5	-0.1	2.1
(4) 事業法人等 Business Corporations	10,932	9.6	10,578	9.2	-354	-3.2	-0.4	22.6
(6) 外国法人等 Foreigners	25,466	22.3	28,858	25.0	3,392	13.3	2.7	29.8
(7) 個人・その他 Individuals	10,233	9.0	9,774	8.5	-459	-4.5	-0.5	17.5

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

億円,% ¥100 mil.,%

	2016年2月 (Feb, 2016)		2016年8月 (Aug, 2016)		増減・増減率 Change・% Change		構成比増減 Change in % of Total	株式分布状況調 査 2015年度 Shareownership Survey
銘柄数 Number of Listed Issues	52		52		0		ポイント point	3,613
合 計 Total	114,047	100.0	115,557	100.0	1,510	1.3	—	100.0
北 海 道 Hokkaido	318	0.3	303	0.3	-15	-4.7	0.0	0.4
東 北 Tohoku	942	0.8	999	0.9	57	6.1	0.1	0.6
関 東 Kanto	73,691	64.6	71,461	61.8	-2,230	-3.0	-2.8	52.1
中 部 Chubu	4,551	4.0	4,730	4.1	179	3.9	0.1	6.8
近 畿 Kinki	4,646	4.1	4,805	4.2	159	3.4	0.1	7.5
中 国 Chugoku	1,776	1.6	1,772	1.5	-4	-0.2	-0.1	1.1
四 国 Shikoku	1,244	1.1	1,255	1.1	11	0.9	0.0	0.8
九 州 Kyushu	1,470	1.3	1,433	1.2	-37	-2.5	-0.1	1.1
海 外 Overseas	25,407	22.3	28,796	24.9	3,389	13.3	2.6	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	52		21		11		20	
合計 (1)+(5)+(6)+(7) Total	115,557	100.0	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	76,924	66.6	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	64,256	55.6	31,343	55.5	10,386	62.9	22,527	53.0
a 都銀・地銀等 City & Regional Banks	7,807	6.8	3,334	5.9	1,437	8.7	3,036	7.1
b 信託銀行 Trust Banks	50,192	43.4	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)	40,871	35.4	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)	1,034	0.9	457	0.8	221	1.3	355	0.8
c 生命保険会社 Life Insurance Companies	2,775	2.4	1,444	2.6	424	2.6	905	2.1
d 損害保険会社 Non-life Insurance Companies	684	0.6	262	0.5	234	1.4	188	0.4
e その他の金融機関 Other Financial Institutions	2,796	2.4	1,273	2.3	457	2.8	1,065	2.5
(3) 証券会社 Securities Companies	2,089	1.8	964	1.7	196	1.2	928	2.2
(4) 事業法人等 Business Corporations	10,578	9.2	5,654	10.0	1,428	8.6	3,495	8.2
(6) 外国法人等 Foreigners	28,858	25.0	13,805	24.4	2,839	17.2	12,213	28.7
(7) 個人・その他 Individuals	9,774	8.5	4,744	8.4	1,673	10.1	3,356	7.9

【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

2016年8月 (Aug, 2016)

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		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	-1.2	-1.6	-2.2
(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	-1.1	3.1	-4.1
a 都銀・地銀等 City & Regional Banks	1,131,255	5.1	495,069	6.5	1,308,545	5.6	-0.1	1.6	-0.9
b 信託銀行 Trust Banks	9,973,184	44.8	3,446,741	45.6	9,391,280	40.0	-1.2	-0.3	-2.7
(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	-0.9	-2.5	-1.7
(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	-0.1	0.0	0.0
c 生命保険会社 Life Insurance Companies	469,212	2.1	152,970	2.0	428,312	1.8	-0.1	0.4	-0.4
d 損害保険会社 Non-life Insurance Companies	113,332	0.5	89,099	1.2	80,412	0.3	0.1	0.4	0.0
e その他の金融機関 Other Financial Institutions	524,161	2.4	194,884	2.6	499,395	2.1	0.2	1.0	-0.1
(3) 証券会社 Securities Companies	378,436	1.7	102,578	1.4	489,244	2.1	-0.1	0.3	0.0
(4) 事業法人等 Business Corporations	2,225,749	10.0	658,377	8.7	2,193,344	9.3	0.1	-4.9	1.8
(6) 外国法人等 Foreigners	5,159,598	23.2	1,448,706	19.1	7,130,355	30.4	1.6	-0.4	2.8
(7) 個人・その他 Individuals	2,262,204	10.2	977,565	12.9	1,972,297	8.4	-0.4	1.9	-0.5

2016年2月 (Feb, 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		12		19	
合計 (1)+(5)+(6)+(7) Total	20,557,613	100.0	10,591,275	100.0	18,555,552	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	13,935,974	67.8	7,356,237	69.5	11,777,152	63.5
(2) 金融機関小計 a+b+c+d+e Financial Institutions	11,515,470	56.0	5,803,274	54.8	9,997,587	53.9
a 都銀・地銀等 City & Regional Banks	1,065,062	5.2	524,023	4.9	1,205,652	6.5
b 信託銀行 Trust Banks	9,456,759	46.0	4,863,587	45.9	7,915,300	42.7
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	7,848,519	38.2	4,268,686	40.3	6,590,662	35.5
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	179,174	0.9	129,932	1.2	168,586	0.9
c 生命保険会社 Life Insurance Companies	455,121	2.2	166,832	1.6	404,749	2.2
d 損害保険会社 Non-life Insurance Companies	88,426	0.4	81,612	0.8	64,489	0.3
e その他の金融機関 Other Financial Institutions	450,102	2.2	167,220	1.6	407,397	2.2
(3) 証券会社 Securities Companies	378,360	1.8	117,006	1.1	395,282	2.1
(4) 事業法人等 Business Corporations	2,042,144	9.9	1,435,957	13.6	1,384,283	7.5
(6) 外国法人等 Foreigners	4,441,196	21.6	2,064,752	19.5	5,122,588	27.6
(7) 個人・その他 Individuals	2,180,443	10.6	1,170,286	11.0	1,655,812	8.9

【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

2016年8月 (Aug, 2016)

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		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	-1.9	-0.1	-3.2
(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	-1.4	2.1	-3.3
a 都銀・地銀等 City & Regional Banks	3,334	5.9	1,437	8.7	3,036	7.1	-0.2	1.5	-0.5
b 信託銀行 Trust Banks	25,028	44.3	7,832	47.4	17,331	40.8	-1.3	-1.0	-2.8
(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	-1.3	-3.4	-2.7
(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	-0.1	-0.1	-0.1
c 生命保険会社 Life Insurance Companies	1,444	2.6	424	2.6	905	2.1	0.0	0.4	-0.1
d 損害保険会社 Non-life Insurance Companies	262	0.5	234	1.4	188	0.4	0.1	0.4	-0.1
e その他の金融機関 Other Financial Institutions	1,273	2.3	457	2.8	1,065	2.5	0.2	0.8	0.1
(3) 証券会社 Securities Companies	964	1.7	196	1.2	928	2.2	-0.1	-0.2	0.1
(4) 事業法人等 Business Corporations	5,654	10.0	1,428	8.6	3,495	8.2	-0.3	-2.0	0.1
(6) 外国法人等 Foreigners	13,805	24.4	2,839	17.2	12,213	28.7	2.4	0.6	3.6
(7) 個人・その他 Individuals	4,744	8.4	1,673	10.1	3,356	7.9	-0.5	-0.5	-0.5

2016年2月 (Feb, 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		12		19	
合計 (1)+(5)+(6)+(7) Total	57,597	100.0	16,114	100.0	40,334	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	39,774	69.1	11,725	72.8	26,847	66.6
(2) 金融機関小計 a+b+c+d+e Financial Institutions	32,782	56.9	9,794	60.8	22,717	56.3
a 都銀・地銀等 City & Regional Banks	3,540	6.1	1,157	7.2	3,069	7.6
b 信託銀行 Trust Banks	26,285	45.6	7,798	48.4	17,584	43.6
(a+bのうち投資信託分) (Out of a+b Investment Trusts)	21,736	37.7	6,480	40.2	14,584	36.2
(a+bのうち年金信託分) (Out of a+b Annuity Trusts)	499	0.9	223	1.4	353	0.9
c 生命保険会社 Life Insurance Companies	1,516	2.6	347	2.2	902	2.2
d 損害保険会社 Non-life Insurance Companies	216	0.4	167	1.0	187	0.5
e その他の金融機関 Other Financial Institutions	1,224	2.1	322	2.0	973	2.4
(3) 証券会社 Securities Companies	1,033	1.8	227	1.4	859	2.1
(4) 事業法人等 Business Corporations	5,958	10.3	1,703	10.6	3,269	8.1
(6) 外国法人等 Foreigners	12,675	22.0	2,679	16.6	10,110	25.1
(7) 個人・その他 Individuals	5,147	8.9	1,709	10.6	3,376	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 2016 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, 2016.

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, 2016. 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 2016 by multiplying the unit-based holding ratio obtained in 1. by the market value of the REIT as of the end of August 2016.

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 2016. 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 2016 are deemed to have no change in holding ratio as of the end of August 2016.