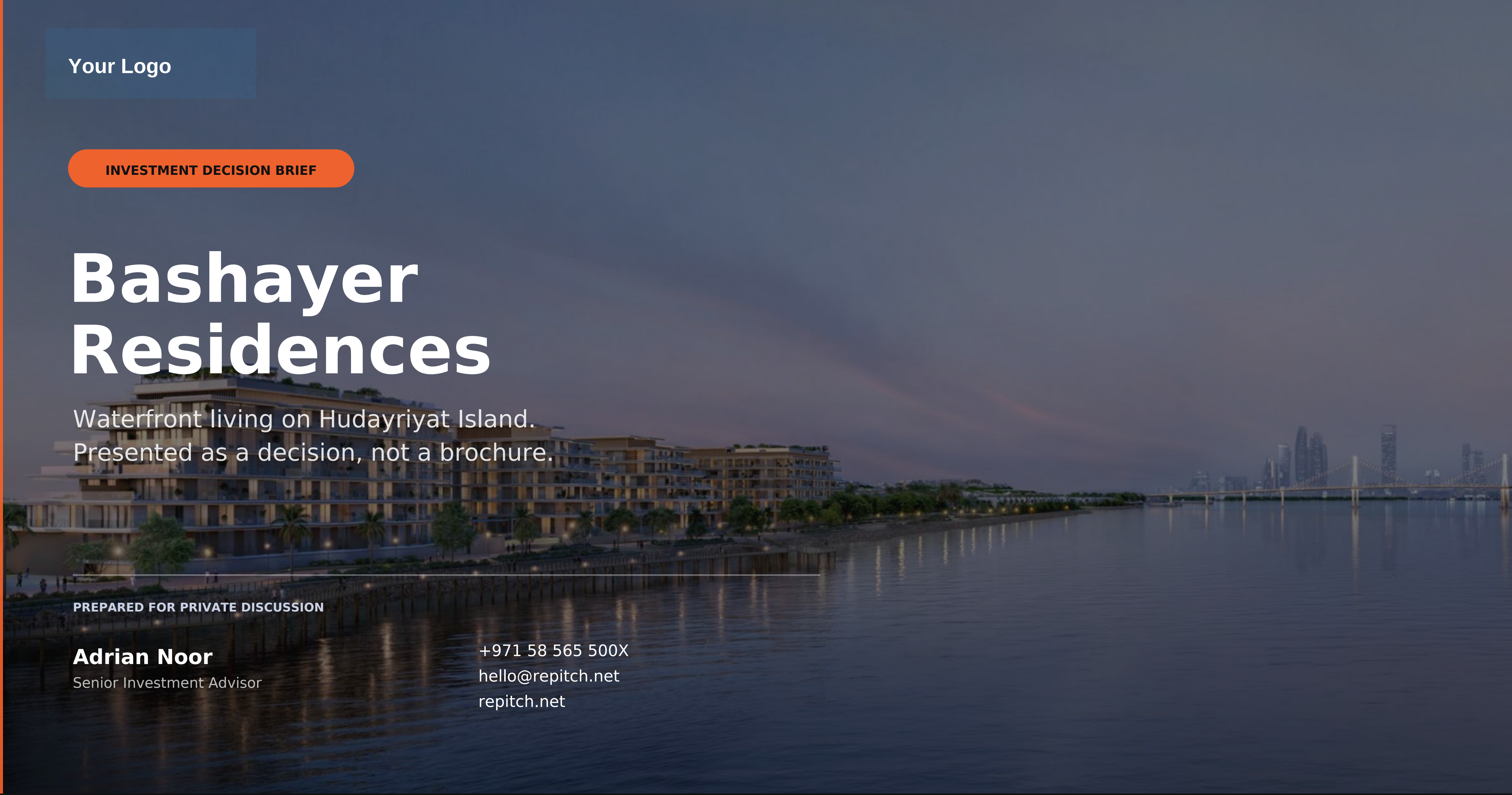

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INVESTMENT DECISION BRIEF

Bashayer Residences

Waterfront living on Hudayriyat Island.
Presented as a decision, not a brochure.

PREPARED FOR PRIVATE DISCUSSION

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Project facts from the supplied Modon brochure. Market figures and scenarios require verification before purchase.

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01 / EXECUTIVE THESIS

The decision in one page.

A differentiated waterfront proposition, but the investment outcome depends on entry discipline and delivery execution.

ENTRY TICKET

AED 2.5m

1-bedroom starting price

REFERENCE RANGE

AED 2,066-2,870

Entry AED per sqft across unit types

CONSTRUCTION FUNDING

50%

Paid through construction

HANDOVER

April 2030

Final 50% due at completion

WHY IT CAN WORK

1. Waterfront and skyline orientation within a large, amenity-led island plan.
2. Reference pricing below the supplied Saadiyat and Al Maryah comparison set.
3. A staged payment structure that preserves 50% of capital until handover.

THE INVESTMENT TEST

The opportunity is attractive only if the selected unit retains a meaningful price-per-square-foot discount after premiums, fees, and financing costs.

RePitch view: shortlist selectively, validate current inventory, then negotiate from unit economics rather than urgency.

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02 / PLACE AND PRODUCT

A waterfront address inside a broader island ecosystem.

Bashayer combines residences, villas, marina frontage, a promenade, community retail, green space, sport and leisure infrastructure.

BROCHURE-VERIFIED ACCESS

15 min	Sheikh Zayed Grand Mosque
25 min	Zayed International Airport
25 min	Abu Dhabi Global Market
35 min	Saadiyat Island
75 min	Al Maktoum International Airport
90 min	Downtown Dubai

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03 / PRODUCT ARCHITECTURE

Six routes into the same waterfront thesis.

Price efficiency improves materially in larger formats. The lowest headline price is not the lowest rate per sqft.

UNIT TYPE	SIZE, SQFT	FROM AED	ENTRY AED / SQFT
1-bedroom	872-1,012	2.50m	**2,867**
2-bedroom	1,389-2,433	3.15m	**2,269**
2-bed townhome	1,765-2,228	4.30m	**2,436**
3-bedroom	1,916-3,218	4.60m	**2,401**
4-bed townhome	2,723-4,155	6.20m	**2,277**
Penthouse	4,355	9.00m	**2,066**

Analytical implication: compare total price, effective AED/sqft, usable area, view permanence and resale audience.

RATE SIGNAL

The 2-bedroom offers the clearest balance of ticket size and rate efficiency.

Still, view, floor, balcony ratio and usable internal area can matter more than the headline rate.

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04 / MARKET POSITIONING

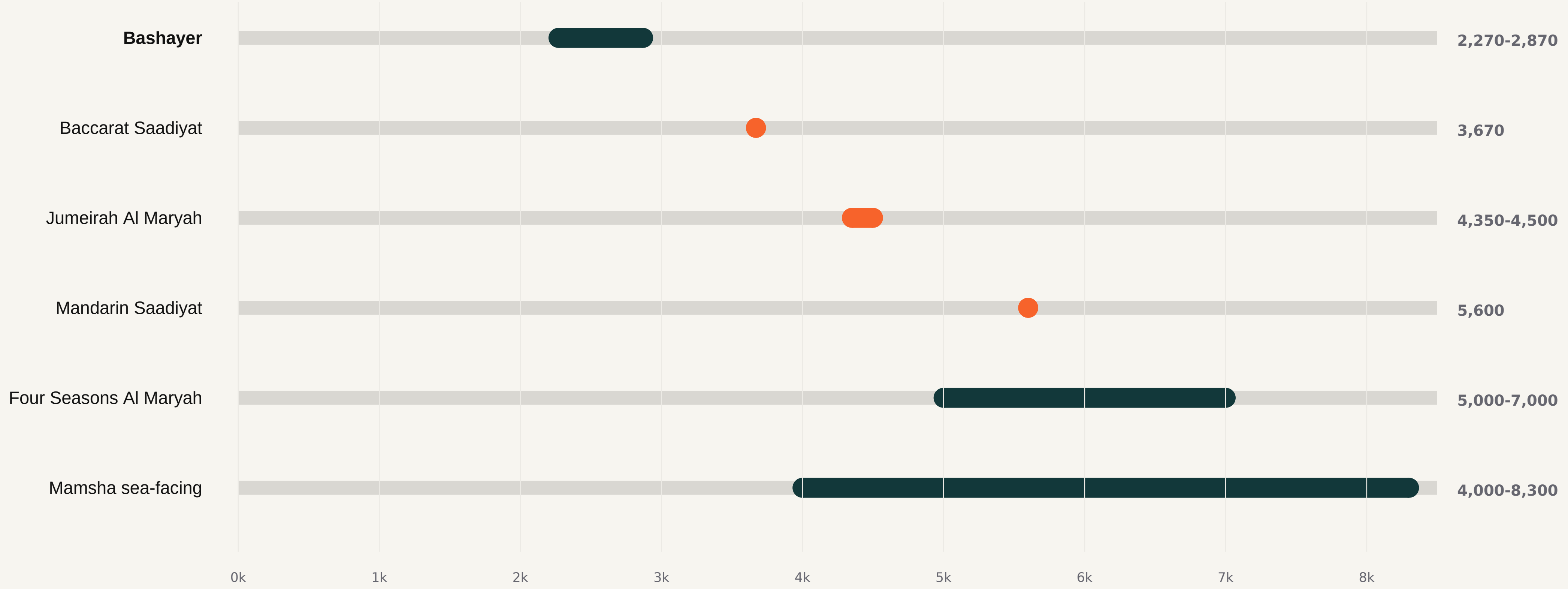
The benchmark set shows a visible entry discount.

This is a directional pricing comparison, not a valuation. Brand, completion status, service charges and exact view quality are not normalized.

SIGNAL

LOWEST ENTRY RATE IN THE SUPPLIED SET

The discount also reflects maturity, construction risk and no global hospitality brand.



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05 / RE-RATING LOGIC

The gap is real. Closing it is conditional.

For an entry rate of AED 2,269/sqft, the table shows value uplift if the market later recognizes higher price bands.

TARGET AED / SQFT	POSITIONING CASE	UPLIFT VS ENTRY
2,870	Upper Bashayer entry band	**+26%**
3,200	Partial gap closure	**+41%**
3,670	Lowest supplied branded comp	**+62%**
4,350	Lower Al Maryah branded band	**+92%**

RePitch principle: treat comparator convergence as upside. Underwrite the purchase so it still works with only partial gap closure.

WHAT MUST GO RIGHT

1. Delivery quality supports the masterplan promise.
2. The waterfront experience becomes established, not merely planned.
3. Resale liquidity develops beyond launch-driven demand.
4. Fees and unit premiums do not erase the initial discount.

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06 / CAPITAL SCHEDULE

50% remains unpaid until handover.

Illustrated on the supplied 2-bedroom entry price of AED 3.15m. Dates and availability must be reconfirmed with the developer.

Capital advantage: staged funding lowers early cash deployment. Capital risk: half the purchase price becomes due at one point, so exit and financing plans must be prepared well before handover.

5%	5%	10%	5%	5%	10%	5%	5%	50%
NOW	JAN 2027	JUL 2027	JAN 2028	JUL 2028	JAN 2029	JUL 2029	JAN 2030	APR 2030
AED 157.5k	AED 157.5k	AED 315.0k	AED 157.5k	AED 157.5k	AED 315.0k	AED 157.5k	AED 157.5k	AED 1.575m

PAID THROUGH CONSTRUCTION

AED 1.575m

50% in staged instalments

DUE AT HANDOVER

AED 1.575m

Concentration of liquidity requirement

NO RENTAL INCOME BEFORE

April 2030

Carry costs must be funded independently

Rental yield is a range, not a promise.

Illustration for a 1,389 sqft 2-bedroom bought at AED 3.15m, before service charges, vacancy, management, furnishing and transaction costs.

CONSERVATIVE

AED 152,790

annual gross rent

4.9% gross yield

AED 110/sqft/year

BASE

AED 187,515

annual gross rent

6.0% gross yield

AED 135/sqft/year

UPSIDE

AED 229,185

annual gross rent

7.3% gross yield

AED 165/sqft/year

NET YIELD REALITY CHECK

The investable number is net income after service charges, vacancy, leasing fees, maintenance and furnishing. A 6.0% gross case can compress materially once operating costs are included.

08 / VALUE SENSITIVITY

Four variables determine the handover outcome.

The matrix separates broad market appreciation from project-specific re-rating. Combining both without care can double-count upside.

	0% annual market	4% annual market	8% annual market	12% annual market
0% project re-rating	AED 3.15m	AED 3.65m	AED 4.20m	AED 4.82m
10% project re-rating	AED 3.47m	AED 4.01m	AED 4.62m	AED 5.30m
20% project re-rating	AED 3.78m	AED 4.38m	AED 5.04m	AED 5.78m

INTERPRETATION

No-growth case: AED 3.15m. At 8% annual market growth: about AED 4.20m. Adding 10% project re-rating: about AED 4.62m. Scenarios, not forecasts.

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09 / RISK DASHBOARD

The strongest pitch includes the reasons not to buy.

Each risk is paired with a practical control that can be completed before reservation.

Delivery and timing	MED-HIGH	Delay changes the return clock and funding plan.	**Verify SPA remedies, escrow, construction milestones.**
Comparator quality	MED	Branded or ready assets may deserve structural premiums.	**Normalize for brand, age, view, status and fees.**
Handover liquidity	HIGH	50% becomes due in April 2030.	**Pre-plan cash, mortgage eligibility and resale timing.**
Net rental yield	MED	Gross rent ignores recurring ownership costs.	**Obtain service charge estimate and net yield model.**

Decision rule: reserve only after the exact unit passes both a qualitative view test and a quantitative all-in cost test.

10 / BUYER FIT

Who fits the Bashayer investment profile?

A good property can still be the wrong investment if the capital horizon or risk tolerance is mismatched.

STRONG FIT

Long-horizon buyer

Comfortable holding through construction and early community maturation.

Capital-secure investor

Can fund the 50% handover balance without depending on a forced resale.

Selective end user

Values waterfront lifestyle, island amenities and Abu Dhabi access.

PAUSE OR RECONSIDER

Short-term income seeker

There is no rent before handover, and timing can move.

Handover-dependent buyer

A forced sale or uncertain financing in 2030 creates asymmetric risk.

Brand-premium speculator

Comparator convergence is possible, but should not be assumed in the base case.

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11 / UNIT ECONOMICS

The efficient entry is not the lowest ticket.

Rate efficiency is calculated from the supplied starting prices and minimum stated sizes. View, floor and usable internal area still require unit-level validation.

UNIT TYPE	STARTING TICKET	ENTRY AED / SQFT	RATE INDEX	RELATIVE SIGNAL
1-bedroom	AED 2.50m	**2,867**	**100**	Baseline
2-bedroom	AED 3.15m	**2,269**	**79**	21% below 1BR rate
2-bed townhome	AED 4.30m	**2,436**	**85**	15% below 1BR rate
3-bedroom	AED 4.60m	**2,401**	**84**	16% below 1BR rate
4-bed townhome	AED 6.20m	**2,277**	**79**	21% below 1BR rate
Penthouse	AED 9.00m	**2,066**	**72**	28% below 1BR rate

ANALYTICAL READ

The 2-bedroom starts at only 26% more capital than the 1-bedroom, while its entry rate is about 21% lower. That makes it the strongest broad-market balance in the supplied schedule, subject to the exact layout and view.

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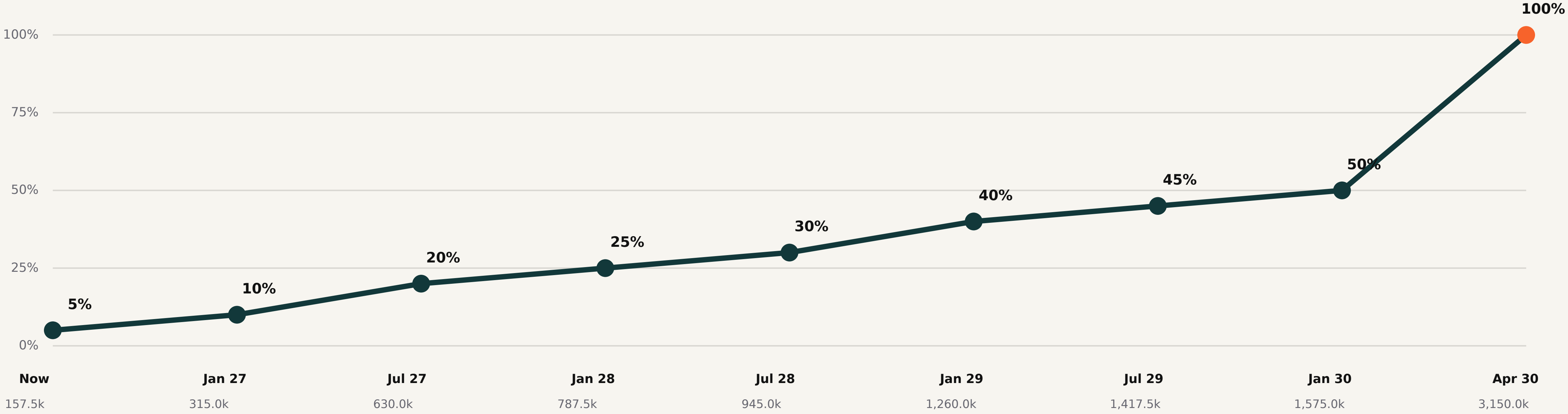
12 / FUNDING EXPOSURE

The funding curve stays light, then jumps at handover.

Cumulative exposure is calculated on the supplied AED 3.15m two-bedroom entry price and stated instalment schedule.



50% FUNDED BY JAN 2030
AED 1.575m cumulative

50% DUE IN APRIL 2030
AED 1.575m single liquidity event

CONTROL
Secure the handover funding route before reservation.

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13 / NET YIELD STRESS TEST

Operating leakage changes the income case materially.

The table applies illustrative 15%, 20% and 25% deductions to the supplied gross-rent scenarios. These deductions are analytical assumptions, not service-charge forecasts.

OPERATING DEDUCTION	CONSERVATIVE Gross rent AED 152,790	BASE Gross rent AED 187,515	UPSIDE Gross rent AED 229,185
15% gross income	**AED 129,872** 4.12% net yield	**AED 159,388** 5.06% net yield	**AED 194,807** 6.18% net yield
20% gross income	**AED 122,232** 3.88% net yield	**AED 150,012** 4.76% net yield	**AED 183,348** 5.82% net yield
25% gross income	**AED 114,592** 3.64% net yield	**AED 140,636** 4.46% net yield	**AED 171,889** 5.46% net yield

BASE CASE READ

At a 20% operating deduction, the supplied base rent produces about AED 150,012 net income and a 4.76% net yield on the AED 3.15m purchase price, before financing and acquisition costs.

A flat market can still produce a loss after exit friction.

Illustration for the AED 3.15m, 1,389 sqft two-bedroom. Required gross sale values recover purchase price after hypothetical selling friction only.

EXIT FRICTION	BREAK-EVEN SALE VALUE	BREAK-EVEN AED / SQFT	PRICE UPLIFT NEEDED
4%	AED 3.281m	AED 2,362	+4.2%
6%	AED 3.351m	AED 2,413	+6.4%
8%	AED 3.424m	AED 2,465	+8.7%
10%	AED 3.500m	AED 2,520	+11.1%

WHAT THIS EXCLUDES

Acquisition charges, financing cost, opportunity cost, maintenance and tax consequences are not included. The true economic break-even will therefore be higher than this simplified selling-friction test.

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15 / DECISION GATES

Move forward only when five gates pass together.

The project thesis is attractive, but the investment decision should be conditional on exact-unit evidence and funding resilience.

01

RATE

All-in AED/sqft retains a defensible buffer after premiums and fees.

02

LIQUIDITY

AED 1.575m handover funding is secured without relying on a forced sale.

03

INCOME

Net yield clears the buyer's hurdle after actual charges and vacancy.

04

ASSET

Layout efficiency, usable area and view permanence pass physical review.

05

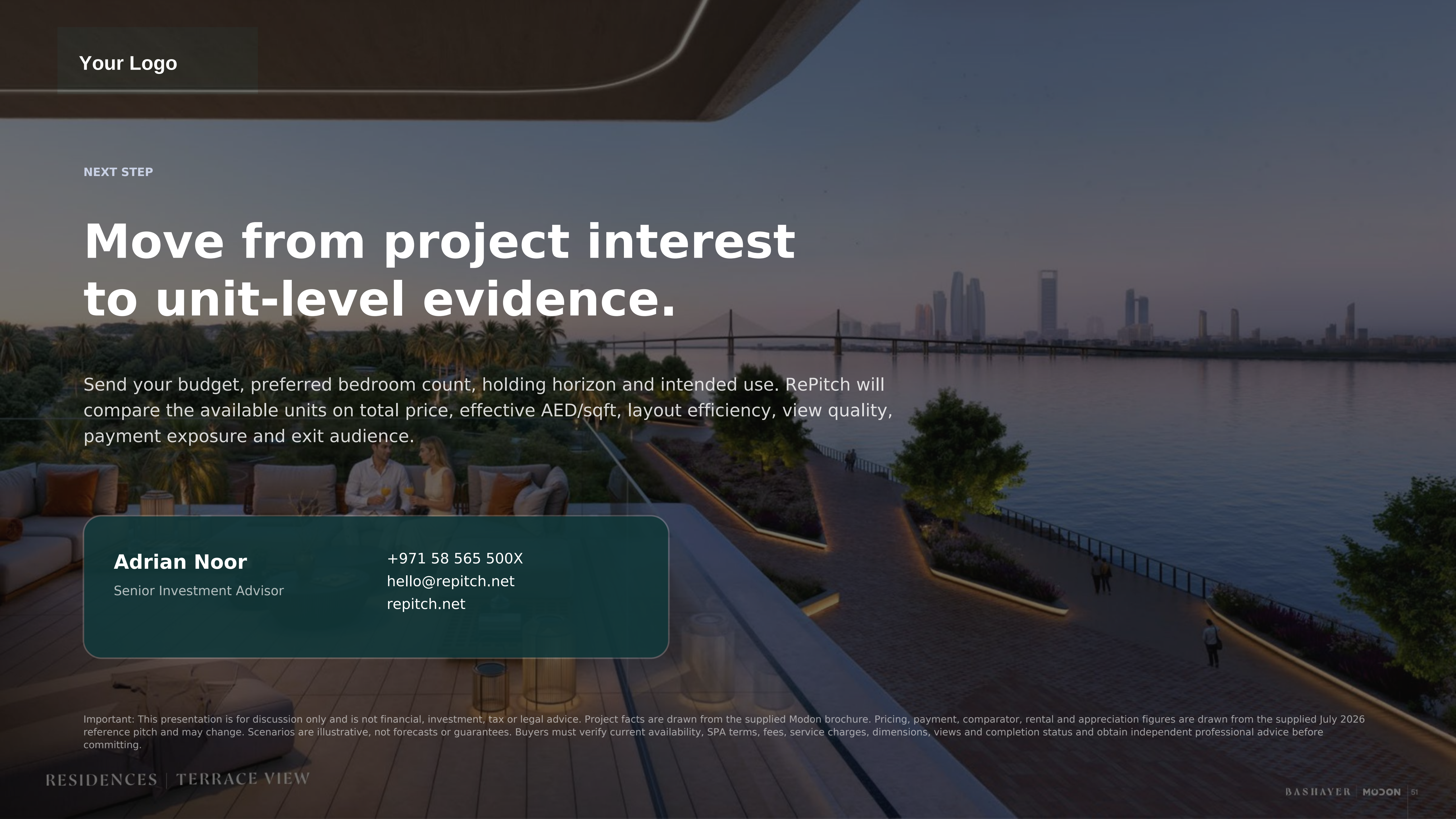
LEGAL

SPA, escrow, delay remedies and cancellation terms pass independent review.

CURRENT STANCE

CONDITIONAL PROCEED

Shortlist first. Reserve only after all five gates are evidenced.



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NEXT STEP

Move from project interest to unit-level evidence.

Send your budget, preferred bedroom count, holding horizon and intended use. RePitch will compare the available units on total price, effective AED/sqft, layout efficiency, view quality, payment exposure and exit audience.

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