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2020 OKC YEAR END RETAIL MARKET SUMMARY

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Photography: Lindsey Torres

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“2021 will be the year of retail recovery, but it will be a very uneven, choppy recovery.”



Thank God for the end of 2020. Nearly 12,000 store closures and numerous bankruptcies only tell part of the story. Have no doubt, there is more to come. Expect more closures and bankruptcies in the first half of 2021 as a number of tenants, particularly small shop tenants, restaurants and entertainment concepts have stretched as far as they can stretch. 2021 will be the year of retail recovery, but it will be a very uneven, choppy recovery.

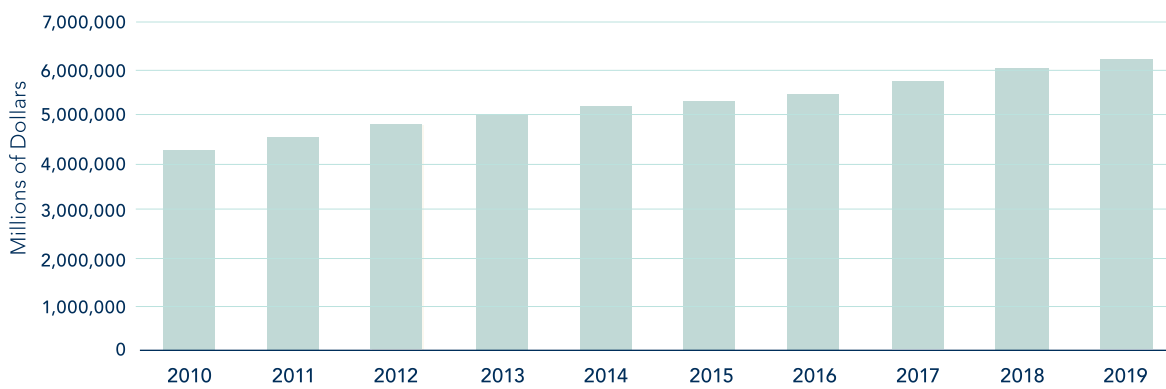
Unbelievably, overall retail sales will increase nearly one percent this year (eMarketer); this is truly amazing given the pandemic and election year chaos. Keep in mind that about 60 percent of retailers are either doing about what sales they did before the pandemic or better. These are the general merchandisers (Target & Walmart), grocery stores, discounters, home improvement stores, and, of course, Amazon. Compared to last year, Dollar Tree’s sales were up 7 percent in the 2nd quarter, 5.1 percent in the third; Costco saw 1st quarter 2021 sales increase 21 percent; Academy’s 3rd quarter sales were up 17.8 percent; Lowe’s, up 30.1 percent in the third quarter; Big Lots' sales have been through the roof. And it's not always the tenants you think it would be,

Ulta’s sales are up, Lululemon saw a 22 percent third quarter increase. These types of tenants and their sales have driven overall sales growth.

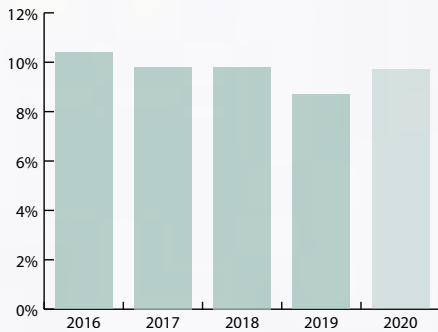
But the pain is real for the retailers in the other 40 percent. These are the tenants that have closed stores, downsized and declared bankruptcy – Guitar Center, Lord & Taylor, Ascena, Brooks Brothers, JCP, J Crew, and Pier 1 – all storied names in retail have declared bankruptcy. Most will come out the other side smaller and stronger, at least financially. Many were in trouble due to being over-leveraged or having lost their way with their customers (or both) prior to the pandemic. This year has not been kind to fashion retailers, boutiques, experiential or entertainment tenants. J Jill’s 3rd quarter sales were down 29.4 percent; Designer Brands was off 30.1 percent; department store sales, already in decline, were down 14-30 percent depending on the retailer in the third quarter. (sales data provided by Creditintel)

Geography makes a difference too, performance has been very uneven across the country – the parts of the country that have

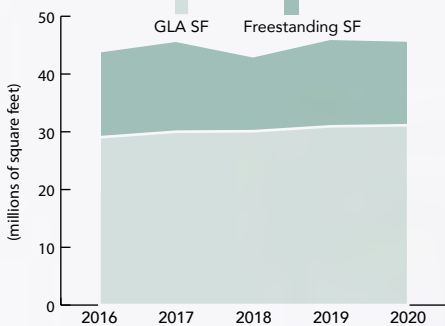
TOTAL ANNUAL RETAIL SALES



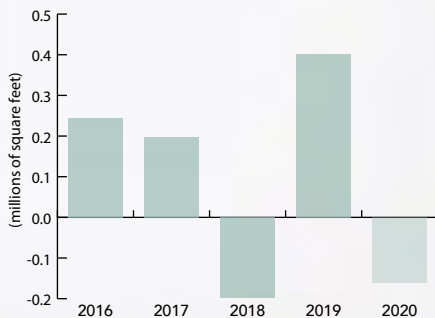
OKC Total Retail Market Vacancy



OKC Total Retail Market Inventory



OKC Total Retail Market Absorption



“Retail is entrepreneurial at its heart. There will be new concepts created out of this.”

continued

remained open or tempered their lock-down have seen a much quicker recovery in sales. In Oklahoma City, our limited restrictions, regardless of your politics on them, have helped our retail market. In the damning with faint praise category, it also helped us that retailers had already adjusted to our energy downturn and were better prepared for what lay ahead.

The pandemic's effect on our market has been felt with vacancy increasing to 9.7 percent at year-end from 8.7 percent a year ago and 9.2 percent at mid-year. We anticipate further vacancy, though not a dramatic increase, in the first half of the year. Unfortunately, restaurants and local tenants will bear much of this burden. As we've said many times in the past, this is the nature of retail, the creative destruction has just been accelerated this past year. This gives good retailers more of an audience, puts a bullet in the head of bad retailers, allows retailers to upgrade locations, and creates opportunities. Retail is entrepreneurial at its heart. There will be new concepts created out of this. We tend to know the tenants that aren't doing well, but we seldom know the next Lululemon. Who knew that Dollar General would start pOpshelf or Dick's would create Public Lands. Retailers have also figured out that physical stores are a necessity, whether you have no online presence like TJ Maxx or you need a store to boost your online sales like Warby Parker. At the end of the day, the retail sales process for most retailers will end up being a seamless/online experience and, to the surprise of many, the market will need all the square footage we have now.

As we look forward to both retail and general economic recovery, a few things would help: Clearly first on this list is a sooner than later end to the pandemic and, for retail, a willingness for shoppers to return to stores. Next is the energy market - we either need a recovery or at least the recovery of some of the lost energy jobs. Small business is the backbone of almost any economy, including ours; given how hard they've been hurt this past year, their recovery is paramount. For retail, these broad and difficult issues almost all translate to population and income growth. In our market, it has historically been much more about population. Retail's best performance these last few years has been when we have grown 1.2 to 1.6 percent per year - the last three years, we've returned to our historic growth rate of about .9 percent per year. Oklahoma City has done better than expected during a very difficult year; 2021 will be a challenge, particularly in the first half of the year, but expect good things to happen as the vaccine takes hold and some pent-up demand is unleashed.

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Our survey tracks 31.1 million square feet in 270 buildings of over 25,000 square feet and 14.3 million square feet of stand-alone buildings for a total market of 45.4 million square feet. There continues to be a significant number of smaller strip centers in the market (under 25,000 s.f. in size). We estimate there are close to 11.75 million square feet of these properties in the market.

RETAIL QUICK HITS

11,000 closed stores & **40**
retailer bankruptcies

About 58% of small business owners say they're worried about permanently closing, according to a July U.S. Chamber of Commerce Survey.

– Bloomberg 8/12/20

PANDEMIC WINNERS



GROCERY



HOME IMPROVEMENT



DISCOUNTERS



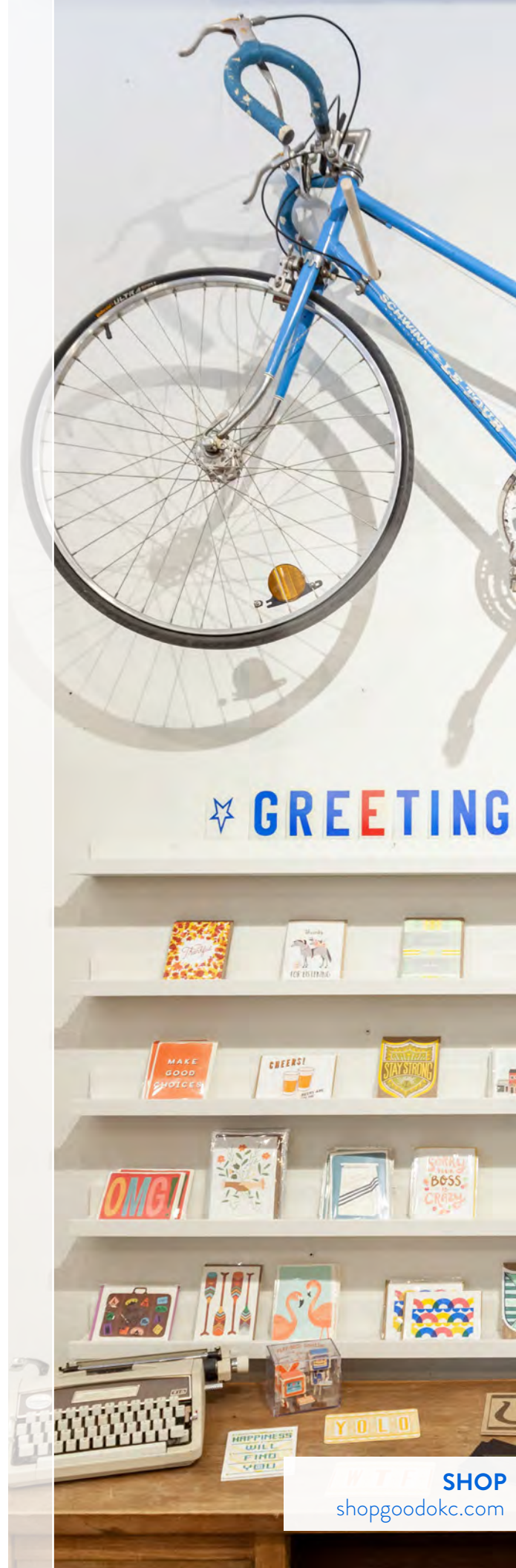
E-COMMERCE



ELECTRONICS

“Costar Group says that the 40 major retailers that filed for Chapter 11 protection and 11,157 stores that closed this year both set new annual records. The 149 million sq. ft. of GLA represented by the closures falls just short of the 155 million sq. ft. mark set in 2018, when scores of department stores shuttered.”

– Al Urbanski





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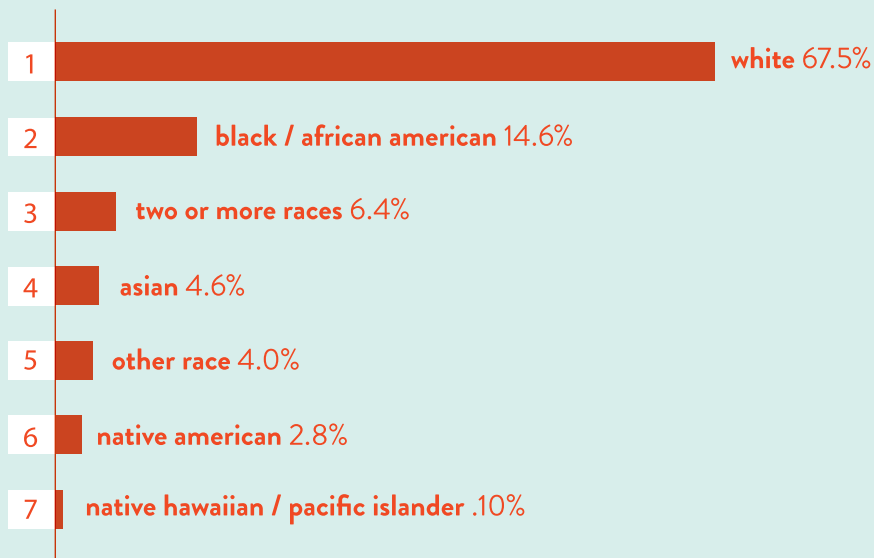
Consumers Unhappy About Online Shopping?

“A new global survey of consumers from Contentsquare indicates only 15% of respondents are happy with their online experience. The survey also reveals that the top 3 causes of customer unhappiness when shopping online are when a site uses pop-ups and advertisements (49%), when a site or app crashes during checkout (48%), and when a discount code doesn't work at checkout (45%).”

– Dan Berthiaume

Oklahoma City Demographics

According to the most recent ACS, the racial composition of OKC is:



– U.S. Census Bureau



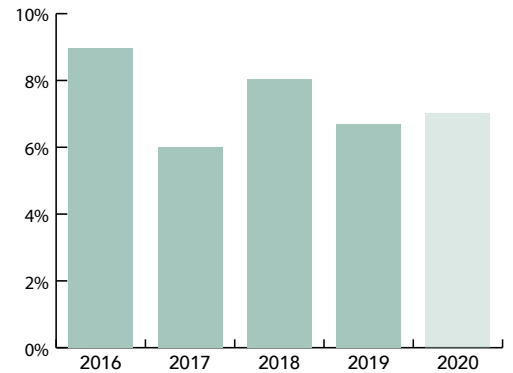
The North Oklahoma City submarket is our largest concentration of retail; of the 7.2 million square feet of space in the submarket, nearly half is along the Memorial Road corridor. Virtually every major national retailer in our market has a presence here and, while there will no doubt be fallout from the current retail environment, retailers continue to look in this area to expand or possibly upgrade locations.

The area around Penn Square Mall, Oklahoma's leading mall, is probably even more highly desired among retailers, but there is limited availability of land for development. Both Quail Springs Mall and Penn Square Mall face significant challenges although both have solidified their positions with the partnership, through Brookfield (Quail Springs owner) and Simon (Penn Square owner) that bought JCP, pre-emptively keeping them open. This both reduces some risk of losing other tenants and gives them upside if they can, together with their operating partners, turn JCP around. Quail Springs Mall will continue to face challenges particularly in light of their recent emphasis on experiential tenants. The current environment also may change the timing of future planned developments, including the next phase of Chisholm Creek and Oak, the planned mixed-use development across from Penn Square. Flix at the Half opened and then closed due to the pandemic. The theater industry and theater anchored developments face an uncertain future – can they survive until we are completely re-opened.

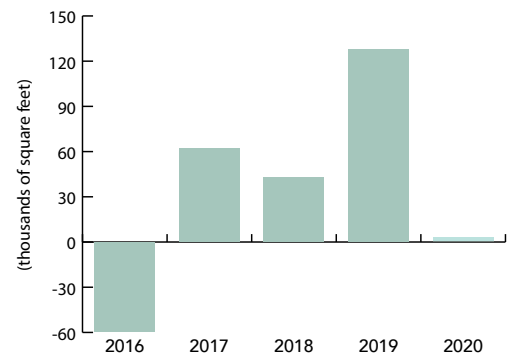
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North OKC Submarket Vacancy



North OKC Submarket Absorption



North	Built/Updated	Leasing Agent	Total Space	Available Space	Vacant	Rate 1	Rate 2	Anchor Tenants
50 Penn Place NW 50th St & N Pennsylvania Ave	1973/2000	In-Rel Properties Chad Khoury	86,802	21,500	24.77%	\$15.00	\$15.00	Full Circle Books, Belle Isle Brewery
6900 Place 6900 N May Ave	1981/1992	CBRE/OKLA Stuart Graham/Kendra Roberts	49,502	11,958	24.16%	\$10.00	\$12.00	Ted's Cafe Escondido, Four Star Fitness
Belle Isle Station NW Expressway & N Classen Blvd	2000	CBRE/OKLA Mark Inman/Stuart Graham	433,333	18,993	4.38%	\$20.00	\$28.00	Walmart Supercenter, Old Navy, Nordstrom Rack
Britton Plaza Shopping Center 2648 W Britton Rd	1975	Gerald Gamble Co. Gerald Gamble	27,800	2,550	9.17%	\$12.00	\$12.00	Johnnie's Charcoal Broiler, ND Foods
Britton Square N May Ave & NW Britton Rd	1983	Rally Group Tommy Garrison	107,821	5,280	4.9%	\$9.00	\$12.00	A-1 Pet Emporium, The Smoking Boar
Camelot Square NW 122nd St & N Pennsylvania Ave		Blanton Property Company Jeff Bolding	107,799	6,783	6.29%	\$0.00	\$0.00	Cox Communications, Casa Perico's, Wingstop
Casady Square W Britton Rd & N Pennsylvania Ave	1953/1995	Interwest Realty George Huffman	141,140	36,157	25.62%	\$12.00	\$16.00	CVS Pharmacy, Walgreens
Centennial Plaza 5801 N May Ave	1993	CBRE/OKLA Mark Inman	233,794	51,850	22.18%	\$12.00	\$16.00	Best Buy, Home Depot
Charter At May 9494 N May Ave	1963/1996	Price Edwards & Company George Williams/Ev Ernst/Jacob Simon	90,474	31,473	34.79%	\$12.00	\$15.00	Interior Fabrics, Tuesday Morning, Bank of America
Classen Curve 5820 NW Grand Blvd	2008	Washington Prime Group Ben Deiser	123,629	1,445	1.17%	\$0.00	\$0.00	Republic, Sur La Table, Warby Parker, Red Coyote, lululemon
Collonade Shopping Center 9600 N May Ave	1984	Brady Properties Ali Ghaniabadi/Mason Ghaniabadi	59,000	6,105	10.35%	\$12.00	\$14.00	Lindsey Medical, Caffe' Pranzo
Colonial Plaza 9225 N May Ave	2003	Eric Roberts Eric Roberts	141,456	0	0%	\$18.00	\$8.00	Homeland, The Garage, Cato
Country Club Corner 6410 N May Ave	1959/1985	JAH Realty Elise Lopez	53,481	0	0%	\$16.00	\$25.00	Sprouts, Half Price Books
Country Club Village 2800 W Country Club Dr	1970/2003	CBRE/OKLA Kelsey Gilbert	30,846	0	0%	\$20.50	\$16.00	Beau's Wine Bin, Edward Jones
Cross Rock Shops 3521-3561 W Memorial Rd	2001	Medallion Group Whitney Rainbolt	24,578	6,898	28.07%	\$22.00	\$22.00	ME/CU Credit Union, McAlister's Deli
Fenwick Plaza 16524 N Pennsylvania Ave	2009/2015	Westbrook Properties Gretchen Bybee	41,804	2,412	5.77%	\$10.74	\$20.64	Allstate Fenwick Liquor
French Market Mall 2836 NW 63rd St	1985	CBRE/OKLA Mark Inman	244,724	9,585	3.92%	\$8.00	\$25.00	Bed Bath & Beyond, Staples, Petco
Gold's Gym Center 2301 W. Memorial	1982/2008	NAI Sulivan Group David Hartnack/Sam Swanson/Nathan Wilson	66,662	0	0%	\$18.00	\$22.00	ATT Flagship Store, Gold's Gym, Chuck E Cheese
Golden Court 1121 NW 23rd St	2010	CBRE/OKLA Kendra Roberts	26,000	2,750	10.58%	\$12.00	\$16.00	T-Mobile, Rent-A-Center
Highland Park Shopping Center W 178th St & N Western Ave	2009	CBRE/OKLA Stuart Graham/Mark Inman	42,428	5,400	12.73%	\$20.00	\$20.00	Louie's, Upper Crust Pizza The Sushi Bar
Lakehurst Plaza 8028 N May Ave	1978/1990	Jacmor, Inc	32,637	0	0%	\$11.00	\$13.50	Gulfport Fish Market Movement Innovations Dance
Lakeside Shops 7401-7535 N May Ave	1964/2011	Pippin Properties	68,179	15,345	22.51%	\$11.00	\$18.00	Firestone/Bridgestone, Freddy's Frozen Custard
Lakewood Shopping Center 6901 N May Ave	1980/2015	Oxford Group Gabby Villareal	64,937	2,434	3.75%	\$10.00	\$12.00	Natural Grocers
Mathis Brothers Village 3400 W Memorial Rd	2016	Owner Managed	80,000	0	0%	\$0.00	\$0.00	Mathis Brothers Sleep Center
Mayfair Place 2900 NW 63rd St	1978	Price Edwards & Company George Williams	95,000	7,091	7.46%	\$12.00	\$15.00	Akin's, Chick Fil-a, PetsMart, Big Lots
Memorial Square 13730 N Pennsylvania	2006	CBRE/OKLA Mark Inman/Stuart Graham	225,000	9,881	4.39%	\$23.00	\$26.50	Super Target, Marshalls, DSW, Golf Galaxy
Midland Center NW Expressway & Independence	1961	Price Edwards & Company Ev Ernst/George Williams/Girma Moaning	54,272	3,503	6.45%	\$0.00	\$0.00	Conn's, Panera Bread

continued

North	Built/Updated	Leasing Agent	Total Space	Available Space	Vacant	Rate 1	Rate 2	Anchor Tenants
Nichols Hills Plaza 6501 Avondale Dr	1963	Washington Prime Group Ben Deiser	144,672	5,000	3.46%	\$0.00	\$0.00	CK & Company, Trader Joes, Starbucks, Balliet's
North Penn Plaza 5601 N Pennsylvania Ave	1970/71	Owner Managed	32,000	0	0%	\$20.00	\$20.00	Bank of The West, Duncan Bros. Salon
Penn Square Mall 1901 NW Expressway	1960/1988	Simon Property Group	1,080,000	25,500	2.36%	\$0.00	\$0.00	Apple, Dillards
Penn-Hefner Plaza 2121 W Hefner Rd	1973/1977	Price Edwards & Company Aaron Diehl	67,805	9,800	14.45%	\$11.00	\$13.00	Beauty World
Plaza at Quail Springs 2221 NW 138th St	2005	JAH Realty Elise Lopez	144,723	7,100	4.91%	\$14.00	\$0.00	At Home
Quail Plaza 10950 N May Ave	1965/1991	Morris Enterprises Kevyn Colburn	194,510	23,405	12.03%	\$12.00	\$17.00	Dollar Tree, Planet Fitness, Goodyear Tire
Quail Springs Mall W Memorial Rd & N Pennsylvania Ave	1980/1999	Brookfield Properties Tyler Cassell/Chris Milkie	1,150,627	37,000	3.22%	\$0.00	\$0.00	Dillard's, Lifetime Fitness
Quail Springs Market Place W Memorial Rd & N Pennsylvania Ave	1998	CBRE/OKLA Mark Inman	410,613	13,828	3.37%	\$15.00	\$30.00	Old Navy, Michaels, Office Depot, Ulta
Quail Springs Village 13801 N Pennsylvania Ave	1983	JAH Realty Elise Lopez	26,350	10,048	38.13%	\$30.00	\$20.00	Cowboy Chicken
Quail Village 14101 N May Ave	2007	Caliber Property Group Robin O'Grady	49,845	0	0%	\$20.00	\$20.00	Cafe 7, Lush, Coolgreens
Shoppes At Northpark 12100 N May Ave	1971/1981	Morris Enterprises Kevyn Colburn	202,106	41,272	20.42%	\$13.74	\$16.79	B.C. Clark, Rococo Restaurant
Shoppes at Quail Springs 13601 N May Ave	2016	Price Edwards & Company George Williams	73,000	6,292	8.62%	\$28.00	\$25.00	Salons by JC, Salata Salad
Shops at Quail Springs NW 146th & Pennsylvania	2012	Blanton Property Company Tom Blanton	90,856	1,595	1.76%	\$0.00	\$0.00	Dick's Sporting Goods, Petco, Zoe's
Shops at North Penn NW/C 150th & N Pennsylvania	2017	CBRE/OKLA Stuart Graham/Mark Inman	33,750	10,200	30.22%	\$24.00	\$24.00	Hollie's, Neighborhood Jam, Ted's Cafe Escondido
Spring Creek North 12200 N May Ave	1981	JAH Realty Elise Lopez	89,006	13,794	15.5%	\$14.00	\$12.00	CVS Pharmacy, Sally Beauty
Ten-Ol West Retail Center 1001 W Memorial Rd	2018	Newmark Grubb Levy Strange Beffort Jay Cohlma/Danny Ojeda/Michael Rapella	43,444	5,895	13.57%	\$28.00	\$28.00	Smoothie King, Club Champion, Jimmy John's
Chisholm Creek Memorial & Pawnee Drive	2016	Medallion Group Whitney Rainbolt	285,883	12,144	4.63%	\$30.00	\$40.00	Top Golf, I-Fly, Republic, Cabela's, Fuzzy's
The Rise 511 NW 23rd St	1920/2014	Land Run Commercial Troy Humphrey/Anna Russell	40,407	0	0%	\$22.00	\$18.00	Anytime Fitness, Cox Cable, Interior Gilt
The Shoppes at North Pointe W Memorial Rd & N May Ave	2002	Price Edwards & Company George Williams	37,684	7,803	20.71%	\$20.00	\$22.00	Jimmy's Egg, City National Bank
The Triangle @ Classen Curve 6001 N Western	2009	Washington Prime Group Ben Deiser	74,881	0	0%	\$0.00	\$0.00	Whole Foods, West Elm, Anthropologie
The Veranda 150th St & N Western Ave	2006	Blackstone Commercial Property Advisors David Bohanon	29,712	17,801	59.91%	\$20.00	\$20.00	Stella Nova, BancFirst
Town & Country Village Shopping Center 12325 N May Ave	1982/1992	Brady Properties Ali Ghaniabadi	43,491	2,400	5.52%	\$12.00	\$14.00	Backwoods, Subway, At the Beach
Village at Quail Springs 2201 W Memorial Rd	2004	CBRE/OKLA Mark Inman/Stuart Graham	100,404	0	0%	\$14.00	\$14.00	Best Buy, Hobby Lobby
Village Park South 10405 N May Ave	1972/2016	NAI Sullivan Group David Hartnack/SamSwanson/Nathan Wilson	42,573	1,625	3.82%	\$10.00	\$12.00	Cashland, Farmers Insurance
Village Plaza 1501 - 1529 W Britton Rd	1964/1989	Price Edwards & Company George Williams	47,580	2,600	5.46%	\$8.00	\$8.00	Westlake Ace Hardware, Dollar General
Wilshire Village W Wilshire Blvd & N Western Ave	1986	Scott Samara, M.D.	27,000	0	0%	\$11.00	\$12.00	Sherwin Williams, Makeup Bar, The Oil Tree
North Totals			7,316,020	514,495	7.03%			

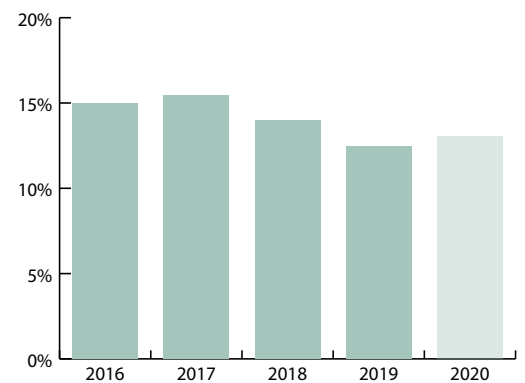
Studio Six

@studiosixokc

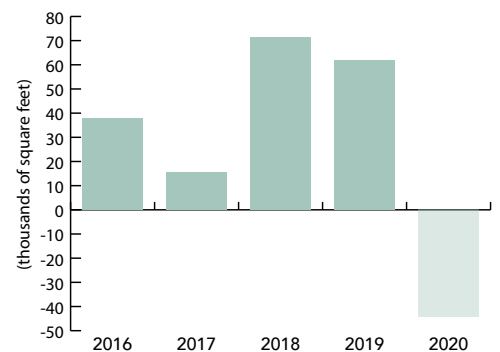


The Northwest submarket was the second worst performing submarket in the second half of the year, ending 2020 with a vacancy of 13.1 percent compared to 11.8 percent a year ago. It is one of the more mature submarkets in the city and continues to see limited new development. Its maturity is one of the reasons for the increase as it includes a number of the long-term retailers that have been hurt by the pandemic. Although, the Northwest market has attracted a few new tenants, such as Ollie's at Council Crossing. As previously noted, for many retailers, this market is their second or third choice. This is reflective of the area demographics and the distressed condition of some of these properties: the northwest submarket is characterized by established neighborhoods with limited population growth and relatively unchanged demographics. This is another submarket with a significant reliance on small shop and local tenants, many of whom are being hurt by the pandemic and resulting economic strains. Expect additional vacancy during the first half of 2021 until we see stabilization.

Northwest OKC Submarket Vacancy



Northwest OKC Submarket Absorption



@edensokc



Northwest	Built/Updated	Leasing Agent	Total Space	Available Space	Vacant	Rate 1	Rate 2	Anchor Tenants
2016 NW 39th St	1973	Dan Dill Property	33,408	9,200	27.54%	\$0.00	\$0.00	Goodwill
2016 NW 39th St		Dan Dill						
3625 Center	1992	Coldwell Banker Commercial	55,646	0	0%	\$15.00	\$15.00	Gold's Gym,
3617 - 3651 NW Expressway		Cris Diffe Pitcock/Anthony Villasenor						Affordable Dentures
Brixton Square	1985	Creek Commercial Realty, LLC	122,042	27,834	22.81%	\$8.00	\$16.00	Panera Bread, T-Mobile,
7101 NW Expressway		Ethan Slavin/AJ Tolbert						Clearsight Center
Cornerstone Plaza	1958/2007	Price Edwards & Company	65,285	14,010	21.46%	\$8.00	\$10.00	Family Dollar, City Bites
NW 39th St & N MacArthur Blvd		George Williams						
Council Crossing	1986/2014	JAH Realty	141,700	20,912	14.76%	\$12.50	\$3.75	Ollie's Bargain Outlet,
8101 NW Expressway		Elise Lopez						Goodwill
Courtyard Plaza	1984	CBRE/OKLA	38,998	10,681	27.39%	\$12.00	\$16.00	Billy Sims BBQ,
6401 NW Expressway		Stuart Graham/Mark Inman						Gentle Dental
Lakeshore Shopping Center	2002	Oxford Group	139,447	1,502	1.08%	\$0.00	\$0.00	Academy Sporting Goods,
4200 NW Expressway		Gaby Villarreal						Planet Fitness, Dollar Tree
Lakeshore Shops	1998	Charles Shadid	30,000	0	0%	\$5.00	\$8.00	Freedom Pawn,
7930 N MacArthur Blvd		Charles Shadid						Al's Bicycles
MacArthur Shops	1983	Owner managed	23,645	0	0%	\$9.00	\$9.00	State Farm,
W Britton Rd & N MacArthur Blvd								Spotted Zebra
Market Place OKC	1985	Newmark Grubb Levy Strange Beffort	178,854	26,857	15.02%	\$12.00	\$9.00	Life Church
5501 NW Expressway		Jim Rose						
Market Plaza	1981/1982	CBRE/OKLA	152,726	31,032	20.32%	\$6.00	\$35.00	Aldi, PetCo,
7001 NW Expressway		Stuart Graham/Mark Inman						Westlake Hardware
Mayfair Village	1948/1990	Precor Ruffin	137,107	78,056	56.93%	\$12.00	\$25.00	Michael's, ALDI,
NW 50th St & N May Ave		Caleb Hill						Steinmart
Newport Shopping Center	2020	Avenue CRE	26,390	13,700	51.91%	\$12.00	\$16.00	Sunshine Laundry
9120 N MacArthur Blvd		Randy Vaillancourt						
Oak Grove Plaza	2015	Zerby Interests	70,249	14,608	20.79%	\$28.00	\$28.00	Sprouts, Orange Theory Fitness,
NW 122nd & MacArthur		W. Scott Bentley						Salata, Hollywood Feed
OKC Market Square	1983/2000	Marquett Realty Investments	143,579	14,588	10.16%	\$12.00	\$12.00	Family Leisure,
8400 NW Expressway		John D Thomas						TJ Maxx; Dollar Tree
Olympia Plaza	1990/98	Price Edwards & Company	34,900	25,100	71.92%	\$10.00	\$8.00	Let's Do Greek Restaurant
7202 W Hefner Rd		George Williams						
Peppertree Square	1984	Newmark Grubb Levy Strange Beffort	77,938	17,336	22.24%	\$8.00	\$8.00	AutoZone,
6444 NW Expressway		Jim Rose						My Dentist
Portland Plaza	1966	JAH Realty	183,312	15,917	8.68%	\$0.00	\$0.00	Winco, Jefferson Dental
NW 39th St & N Portland Ave		Elise Lopez						
Quailbrook Plaza	1987	Price Edwards & Company	90,228	9,282	10.29%	\$15.00	\$15.00	Phycon, OTA PikePass Office,
4401 W Memorial Rd		George Williams						Mercy Health Center
Rock Center	1992	Newmark Grubb Levy Strange Beffort	29,000	1,750	6.03%	\$14.00	\$14.00	Avis, Cricket
6714 NW Expressway		John Cohlma						
Rockwell Crossing	1986	Churchill Brown Realtors	30,200	3,750	12.42%	\$12.00	\$8.00	YMCA,
12100 N Rockwell Ave		Mitra Senemar						Pizza Hut
Rockwell Northwest	1985/1999	JAH Realty	154,944	6,753	4.36%	\$24.00	\$9.00	Hobby Lobby, Party City,
7000 NW Expressway		Elise Lopez						Tuesday Morning, Skecher
Rockwell Plaza	1981/2000	RCG Ventures	414,507	51,150	12.34%	\$0.00	\$0.00	Target, PetSmart,
7104 NW Expressway		Lee Zimmerman						Ross Dress for Less
Silver Springs Pointe	2000	CBRE/OKLA	700,000	10,114	1.44%	\$15.00	\$20.00	Wal-Mart, Mattress Firm,
7640 NW Expressway		Stuart Graham/Mark Inman						Home Depot

Northwest	Built/Updated	Leasing Agent	Total Space	Available Space	Vacant	Rate 1	Rate 2	Anchor Tenants
Springbrook Shopping Center 6207 NW Expressway	1968	Newmark Grubb Levy Strange Beffort Michael Almaraz	50,000	10,000	20%	\$10.00	\$12.00	10 Gym Fitness
Springdale Shops NW 50th St & N Meridian Ave	1962/2014	Price Edwards & Company George Williams	126,000	24,215	19.22%	\$10.00	\$10.00	Dollar General, Super Mercado
Walnut Village 12301 N Rockwell Ave	1986/2000	Rally Group Tommy Garrison	55,515	3,150	5.67%	\$13.00	\$16.00	Nhinja Sushi, Leslie's Pool Supplies
Warr Acres Shops NW 50th St & N MacArthur Blvd	1960/1994	Core Real Estate Jim Sanders	34,400	0	0%	\$5.00	\$6.00	Big Red Shop
Warwick Crossing 6909 W Hefner Rd	1995	56 Expressway Christina Vescovo	31,804	6,158	19.36%	\$12.50	\$14.00	Flexible Fitness, Watch Me Grow Childcare
Warwick Plaza NW 122nd St & N MacArthur Blvd	1984	Newmark Grubb Levy Strange Beffort Jim Rose	60,443	1,000	1.65%	\$9.00	\$11.00	Swiss Cleaners
Northwest Totals			3,432,267	448,655	13.07%			



Carpe Artem Gallery
@carpeartemokc

on Corner Creations
Bird platter
C04 \$180

Waxton Corner C
Handmade Journa
LCC06 \$55

Eden Boutique

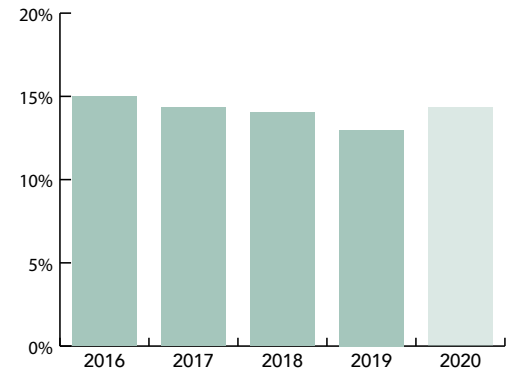
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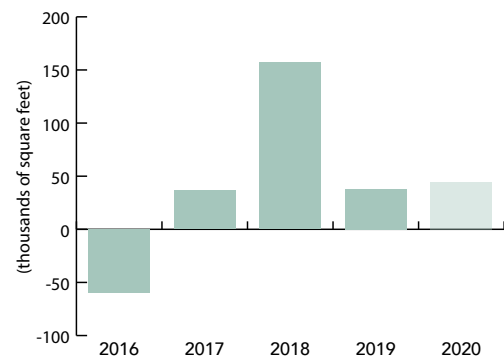


South Oklahoma City performance was very choppy during the year, going from 13.0 percent at year-end, to 15.5 percent at mid-year, to 14.3 percent at year-end. The market is very much a mixed bag with the northern half of this submarket heavily reliant on the Hispanic shopper; it is largely characterized by smaller centers with relatively good occupancy. The middle section of the market is mostly older power centers that have seen an increase in vacancy over the past few years. Tenants along the Interstate 240 corridor tend to do well, but the retail momentum has moved south to Moore. Then, the southern portion of the market is primarily strip centers and neighborhood centers that have remained relatively full. Zerby Interests is moving forward with plans to re-configure and expand Shields Plaza although timing is unknown. Until that re-development is started, no significant new development is anticipated in this submarket.

South OKC Submarket Vacancy



South OKC Submarket Absorption



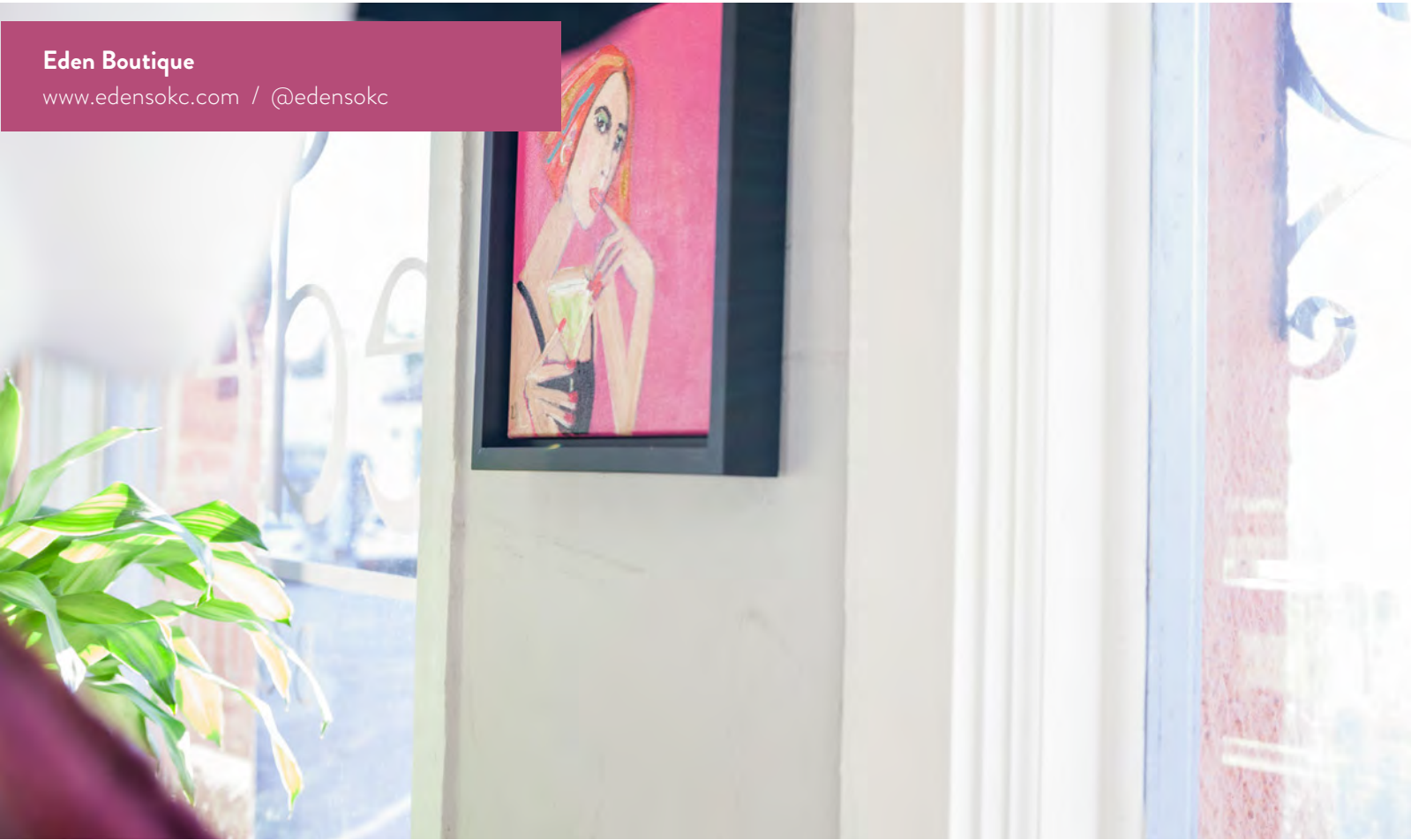
South	Built/Updated	Leasing Agent	Total Space	Available Space	Vacant	Rate 1	Rate 2	Anchor Tenants
240 Penn Park 1409 W I-240	2005	RCG Ventures Lee Zimmerman	241,831	0	0%	\$12.00	\$20.00	Ross, Michael's, PetSmart, Marshalls
240 Penn Park Phase II 1609 - 1615 Penn Park Blvd	2017-2018	CBRE/OKLA Mark Inman/Stuart Graham/Ryan Storer	70,658	2,500	3.54%	\$17.50	\$17.50	Conn's, Skechers
74 South Centre SW 74th St & S Penn Ave	1973/2006	Paul B. Odom Construction Paul Odom	50,000	0	0%	\$11.00	\$17.00	At the Beach Red Wing
800 SW 44th St. 800 SW 44th St.	1969/2018	Vista Property Company Mason duPerier	146,207	60,000	41.04%	\$8.00	\$18.00	Westlake Ace Hardware, Auto Zone, Dollar Tree
89'er Plaza SW 89th St & S Walker Ave	1984	Lauren Weyhe Lauren Weyhe	30,000	2,500	8.33%	\$6.00	\$10.00	Flying Eagle Coins
Airline Shopping Center 3200 SW 29th St	1999	Price Edwards & Company Aaron Diehl	123,065	19,854	16.13%	\$9.00	\$13.00	Tom's Tires, El Rodeo Carniceria
Almonte Square 6100 S May Ave	1963/2014	Price Edwards & Company Everest Ernst	107,676	41,203	38.27%	\$0.00	\$0.00	Oklahoma Metropolitan Library, Family Dollar, Planet Fitness
Brookwood North I & II SW 89th St & S Western Ave	1998	eXp Realty Ethan Walker	57,795	3,000	5.19%	\$6.00	\$8.00	China Wok Restaurant, Chelino's Restaurant
Brookwood Shopping Center SW 89th St & S Western Ave	1984/2012	Precor Ruffin Rick Pritchett	80,615	4,224	5.24%	\$12.00	\$16.00	Planet Fitness, Goodwill, Game HQ
Centre 8400 8400 S Western Ave	1984	Precor Ruffin Rick Pritchett	29,220	1,200	4.11%	\$10.00	\$10.00	H&R Block, Valir Health
Charlie Plaza 12201 & 12301 S Western Ave	2018	Brady Properties Ali Ghaniabadi/Mason Ghaniabadi	24,892	3,600	14.46%	\$18.00	\$18.00	Club Pilates, Nhinja Sushi

continued

South	Built/Updated	Leasing Agent	Total Space	Available Space	Vacant	Rate 1	Rate 2	Anchor Tenants
Chatenay Square SW 104th St & Penn Ave	2000	Precor Ruffin Rick Pritchett	114,115	16,530	14.49%	\$17.50	\$0.00	World Fresh Int'l Market Panera Bread
Country Park Shopping Center 5906 S Agnew Ave	1978/2014	Land Run Commercial Andrew Hwang	24,360	2,600	10.67%	\$7.00	\$7.00	Value Thrift
Crest Shopping Center 3000 SW 104th	2012	Newmark Grubb Levy Strange Beffort John Cohlma	99,000	1,750	1.77%	\$19.00	\$19.00	Crest, Subway, Cox
Crossroads Shopping Center 7100 S. I-35 Service Rd.	1987	Precor Ruffin Rick Pritchett	58,871	31,269	53.11%	\$10.00	\$10.00	Concentra
Economy Square SW 29th St & S May Ave	1963/98	Newmark Grubb Levy Strange Beffort Michael Almaraz/Louis Almaraz	203,451	1,800	0.88%	\$9.00	\$17.00	Buy For Less, Dollar Tree, Walgreens, Dollar General
Grant Square SW 44th St & S Pennsylvania Ave	1958/1992	Emersons Commercial Real Estate Terry Watson	103,810	11,000	10.6%	\$8.51	\$10.40	Aaron Rents
Greenbriar Square 12230 S. Pennsylvania Ave.	2018	CBRE/OKLA Stuart Graham	37,200	0	0%	\$18.00	\$22.00	Sprouts, Great Clips
Greenway Plaza SW 119th St & S Western Ave	1985	Newmark Grubb Levy Strange Beffort Jim Rose	117,251	5,975	5.1%	\$12.00	\$12.00	Westlake Hardware, Tuesday Morning
Hillcrest Shopping Center 2100 SW 59th St	1971	Owner managed	50,000	35,000	70%	\$0.00	\$0.00	Athena Greek
I-240 Plaza 7800 S Western	1988	Brady Properties Ali Ghaniabadi/Mason Ghaniabadi	27,120	4,800	17.7%	\$12.00	\$12.00	Pro Nails, Jackson Hewitt
Kentucky Shops SW 29th St & S Kentucky Ave	1970	L & S Real Estate Young Shin	32,500	0	0%	\$4.00	\$0.00	Family Dollar
Lightning Creek Square 8121 S Western Ave	1985	Lightning Creek Complex Debra Gutierrez	48,005	0	0%	\$8.00	\$0.00	Costume Shop, Allstate, Jewel Box
Mayridge Shopping Center SW 44th St & May Ave	1956	Buddy Shadid	38,000	0	0%	\$5.00	\$5.00	Dollar General
Palagio Shops SW 104th St & S Western Ave	2005	PB Odom III Paul Odom III	47,547	2,125	4.47%	\$17.50	\$0.00	Pizza Hut, Jump Zone, McAlister's Deli, Sports Clips
Reding Shopping Center Grand Blvd & S Western Ave	1972	JAH Realty Elise Lopez	86,335	9,319	10.79%	\$12.00	\$7.00	Buy for Less Dollar General
Shields Plaza SW 74th & S Shields Blvd	1972/2011	Zerby Interests W. Scott Bentley	158,000	21,689	13.73%	\$14.00	\$12.00	Burlington, Harbor Freight
South Meridian Plaza 1025 S Meridian Ave	1983	Creek Commercial Realty, LLC Ethan Slavin/AJ Tolbert	36,100	2,000	5.54%	\$13.50	\$17.00	Billy Sims BBQ, Cowboy Cleaners
South Park 4500 S May Ave	1975	Owner Managed Henry Tien Nguyen	86,848	0	0%	\$10.00	\$5.00	Carniceria El Rodeo #2
South Penn Plaza 1620 SW 89th St	1984	Emersons Commercial Real Estate Terry Watson	143,407	31,000	21.62%	\$13.00	\$8.00	Panang Thai Restaurant, Supercuts
Southeast Plaza SE 44th St & S High Ave	1964	Emersons Commercial Real Estate Terry Watson	195,266	12,900	6.61%	\$4.50	\$9.00	Smart Saver, OKC Plaza Latina, Family Dollar
Southern Hills SW 74th St & S Pennsylvania Ave	1964/1990	CBRE/OKLA Kendra Rogers/Stuart Graham	202,247	87,004	43.02%	\$8.00	\$22.00	Northern Tool, Dollar Tree
Southwestern Plaza SW 59th St & S Western Ave	1962/1987	Coldwell Banker Commercial Jerry Hocker/Jack James	122,527	1,200	0.98%	\$7.00	\$8.00	Family Dollar, Cocino De Mino Mexican Restaurant
Stonebriar Shopping Center 13316 S Western Ave	2005	Brady Properties Ali Ghaniabadi	30,000	1,300	4.33%	\$12.00	\$12.00	Farmers Insurance Dental Innovations
Summit Pointe Plaza SW 89th St & S Western Ave	2008	Price Edwards & Company George Williams	30,414	8,400	27.62%	\$16.00	\$16.00	Louie's, T-Mobile
SW 119th Street Marketplace 801 SW 119th St	2009	HCB Commercial Real Estate Co Scott Heiple	28,676	4,800	16.74%	\$12.00	\$14.00	Dental Expressions, Papa Murphys
Towne South Plaza SW 74th St & S Walker Ave	2004/2010	Creek Commercial Realty, LLC Aj Tolbert/Ethan Slavin	130,000	18,900	14.54%	\$20.00	\$8.00	Heartland Dental, Chuck E Cheese
Walker Square SW 59th St & S Walker Ave	1983	Precor Ruffin Rick Pritchett	100,430	27,393	27.28%	\$9.00	\$9.00	Buy For Less Supermercado
Walnut Square 2209 SW 74th St	1985	Price Edwards & Company Ev Ernst/George Williams/Jacob Simon	314,299	29,054	9.24%	\$12.00	\$18.00	Big Lots, Hobby Lobby, Green Acres Market, dd's Discount
Westernview Center 7107 S Western Ave	1958/78	CBRE/OKLA Stuart Graham/Mark Inman	104,000	18,517	17.8%	\$6.00	\$17.00	Taste of China, Dollar General
Westminster Village 10625 S Western	1986	Brady Properties Ali Ghaniabadi/Mason Ghaniabadi	79,500	22,170	27.89%	\$8.00	\$26.00	Lumpy's, Bella Capelli Salon, Huntington Fine Jewelers
South Totals			3,811,238	546,576	14.34%			

Eden Boutique

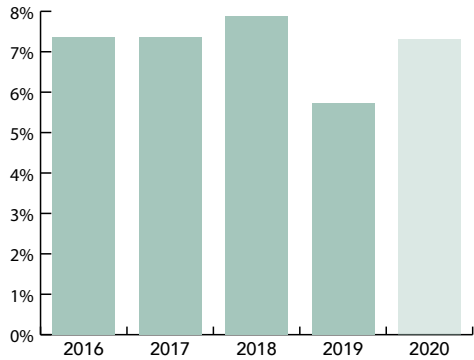
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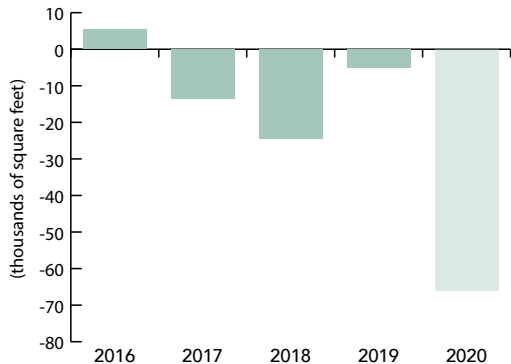
The West Central submarket has not escaped the increase in vacancy reflected in the market as a whole. Vacancy reached 7.3 percent in December from 5.8 percent at the end of 2019. Although, this remains one of the better performing markets. Westgate Marketplace, Yukon Village, The Market at Czech Hall, and West End Pointe and the OKC Shoppes comprise nearly half the total product in the submarket. These newer properties are well-occupied but have experienced a handful of store closures. The corridor draws not only from the Interstate-40 traffic but from a large swath of homes north of Interstate-40 that have limited access to retail, particularly new retail. Any new development, other than the new HomeGoods at The Market at Czech hall is on hold for now, including the former Cotton Mill parcel and the proposed development around the First Americans Museum.

The Interstate-40 and Portland area, home to 40 stores, containing over 2.5 million square feet that specialize in furniture and accessories, remains the hub of furniture sales for the City. The recently re-modeled flagship Mathis Brothers' store anchors this hub and, given the single family home building/remodeling boom, the industry should continue to do well and maintain occupancy.

West-Central Submarket Vacancy

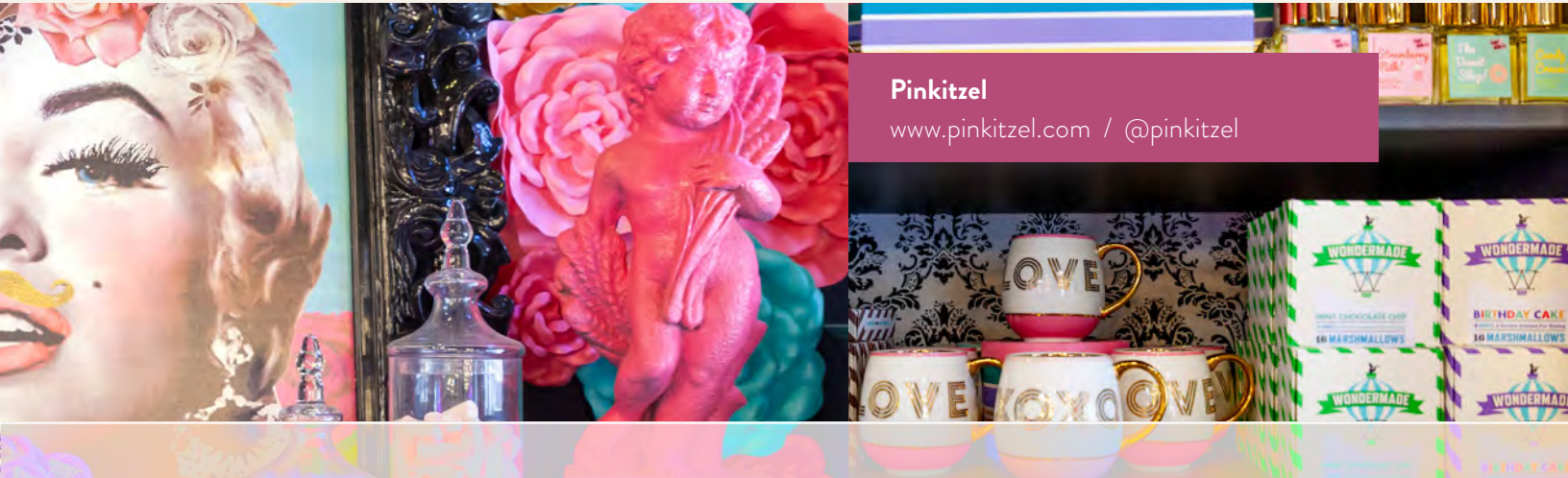


West-Central Submarket Absorption





West-Central	Built/ Updated	Leasing Agent	Total Space	Avail. Space	Vacant	Rate 1	Rate 2	Anchor Tenants
36th & May Center NW 36th St & N May Ave	1986	B.D. Eddie Enterprises Terry McGuire	97,500	3,750	3.85%	\$10.00	\$12.00	Locke Supply, Swiss Cleaners
Ann Arbor Terrace 4913 NW 23 St	1971	Owner Managed	30,000	0	0%	\$6.00	\$0.00	Feria Latina Super Market, Ultimate Thrift Store
Bethany Shopping Center 8000 NW 39th	2016	Newmark Grubb Levy Strange Beffort Michael Almaraz	28,250	7,440	26.34%	\$17.00	\$17.00	Family Dollar, Subway
Chisholm Shopping Center I-40 & Garth Brooks Blvd	1972/2007	CBRE/OKLA Stuart Graham	227,630	51,984	22.84%	\$5.00	\$16.00	Sprouts, Planet Fitness
DeVile Shopping Center 2408 N. Council Road	1962/1994	Love Management	125,407	0	0%	\$5.00	\$6.00	Buy For Less, Heart & Hand Thrift
Glen Oaks NW 23rd St & N Rockwell Ave	1968/1998	JAH Realty Elise Lopez	49,161	1,800	3.66%	\$18.00	\$6.00	Ace Hardware, Dollar Tree, Anytime Fitness
Indiana Center 1708 N Indiana Ave	2002	Owner Managed	26,000	0	0%	\$5.00	\$9.00	Scorecards Sports Bar, Bad Granny's
MacArthur Court 3804 N MacArthur Blvd	1985/2018	Creek Commercial Realty, LLC Ethan Slavin/Tyler Huxley	51,198	14,950	29.2%	\$13.50	\$13.50	GSA, Homestead Senior Care
MacArthur Park Shopping Center 2300 N MacArthur Blvd	1997	Price Edwards & Company Aaron Diehl	60,472	1,900	3.14%	\$13.00	\$13.72	Community Thrift Store, Queen of Sheba Restaurant
Meridian Plaza 4546 NW 16th St	2016	Baker First Commercial Real Estate Rod Baker/Bill Reid	92,524	3,761	4.06%	\$6.00	\$6.00	H&R Block, James Lighting
Morgan Creek Plaza 1701 S Morgan Rd	1988	Westbrook Properties Gretchen Bybee	35,930	2,160	6.01%	\$9.42	\$10.11	State Farm, Clint Pitt, DDS
Mustang Crossing 15th & Mustang Rd	2015/2018	Hayes Brokerage Don Hayes	30,000	0	0%	\$15.00	\$20.00	Jojo's, Pho Hieu
Mustang Shopping Center 216 N Mustang Mall Terr	2004	Schostak Brothers & Company Rebecca Dragin	35,846	8,253	23.02%	\$12.00	\$16.00	Anytime Fitness, Cato, Dollar Tree
Mustang Trade Center Hwy 152 & S Mustang Rd.	2015	McGee Commercial Real Estate Chad Arnold	133,678	21,126	15.8%	\$10.00	\$22.00	CashSaver
OKC Outlets NE C of I-40 & Council Rd	2010	Torg Marc Gurstel	430,835	59,136	15%	\$25.00	\$14.00	Nike, Polo, Coach, Michael Kors
Old Mill Plaza 301 Elm Ave	1974	Deer Horn Development Ray Wright	82,730	0	0%	\$8.00	\$4.00	Locke Supply
Penn Crossing NW 23rd St & N Pennsylvania Ave	1994	Brady Properties Ali Ghaniabadi	133,356	19,350	14.51%	\$7.50	\$8.00	Wal Mart Neighborhood Market, Dollar Tree, Mazzio's, Westlake
Plaza DeVille 2409 N Council Road	1970/2012	Charles Shadid Charles Shadid	24,565	0	0%	\$4.00	\$8.00	Omega Health Foods, Electrolux Vacuum
Plaza Shoppes of Turtle Creek 915-951 S Cornwell Dr	1986/ 2000	Plains Commercial Real Estate Grant Hudiburg/Ryan Storer	23,000	0	0%	\$10.50	\$12.00	Hair Expressions
Portland Square NW 23rd St & N Portland Ave	1958/1987	Charles Johnson, DDS Chuck Johnson	38,000	0	0%	\$4.00	\$0.00	Sam's Wholesale Liquor, OK Family Thrift
Rockglen Retail Center 1500 N Rockwell Ave	1994	Owner Managed	25,308	0	0%	\$3.50	\$0.00	Well Club

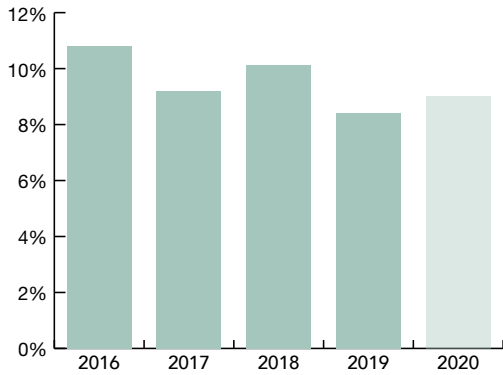


Pinkitzel

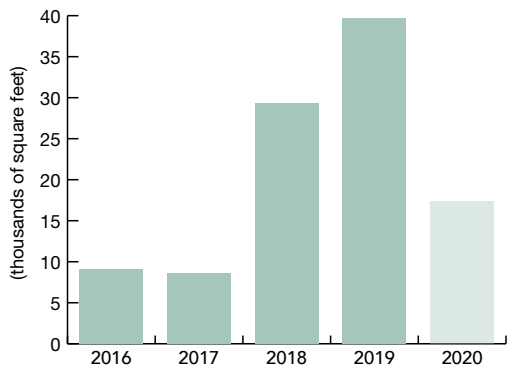
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West-Central	Built/ Updated	Leasing Agent	Total Space	Avail. Space	Vacant	Rate 1	Rate 2	Anchor Tenants
Shartel Plaza 5225 N Shartel Ave	1965	Price Edwards & Company Tom Fields	40,736	4,139	10.16%	\$14.00	\$17.50	CVS
Silver City Town Center 101 N Mustang Rd	1974/2015	Interwest Realty George Huffman	88,851	5,836	6.57%	\$13.00	\$13.00	Tractor Supply, Bronco Bowl
Ten-M NW 10th St & N Meridian Ave	1958/2017	Corsair Estate, LLC Scott Smith	33,100	0	0%	\$10.00	\$12.00	Liberty Tax
The Market at Czech Hall NW 10th & Interstate 40	2017	CBRE/OKLA Stuart Graham	161,636	0	0%	\$26.00	\$26.00	Academy, Ross, Ulta, Petco, Marshalls
The Plaza at Stone Mill 1348 S Yukon Parkway	2015	Owner Managed	36,000	9,600	26.67%	\$18.00	\$18.00	Pie 5 Pizza Great Nations Bank
Walnut Creek 1110 N MacArthur Blvd	1974	eXp Realty Ethan Walker	54,382	16,281	29.94%	\$3.00	\$3.95	Thermo Roll Shutters
West End Pointe I-40 & Garth Brooks Blvd	2015	McGee Commercial Real Estate Chad Arnold	522,500	16,498	3.16%	\$15.19	\$21.00	Lowe's, Staples, Kohl's
West Pointe Plaza 300 S Mustang Rd	2006	CH4 Development Daniel Le	27,004	0	0%	\$13.00	\$13.00	Crossfit SuperCuts
West Pointe Shoppes Phase II 700-742 S Mustang Rd	2008	Baker First Commercial Real Estate Rod Baker	24,856	3,920	15.77%	\$13.00	\$13.00	State Farm, Affordable Dentistry
Westgate Marketplace I-40 & S MacArthur Blvd	2000/ 2014	Zerby Interests W. Scott Bentley	900,500	32,942	3.66%	\$17.00	\$28.00	Wal Mart, Panera Bread, Home Depot, Best Buy, Ulta, Dick's Sporting Goods
Westoaks Village NW 10th St & N Rockwell Ave	1964	Baker First Commercial Real Estate Lori Petit	93,270	0	0%	\$3.90	\$3.90	Family Dollar Builders Warehouse
Westpointe Plaza 320 S Mustang Rd	2000	CH4 Development Daniel Le	25,680	0	0%	\$10.00	\$12.00	Subway, Hunan Express
Will Rogers Park Plaza 3100 N Portland Ave	1982	eXp Realty Ethan Walker	160,000	1,750	1.09%	\$4.00	\$6.00	Oriental Imports
Windsor Hills 4601 NW 23rd St	1960/1998	Newmark Grubb Levy Strange Beffort Danny Ojeda/Jay Cohlmiya/Mi- chael Rapella	256,250	37,397	14.59%	\$7.00	\$12.00	Crest Foods, Ross, dd's Discount
Windsor Park 2536 N Meridian Ave	1982	Newmark Grubb Levy Strange Beffort Michael Almaraz	26,500	0	0%	\$14.00	\$14.00	Ci Ci's Pizza, Jackson Hewitt
Yukon Hills Shopping Center S Cornwell Dr & E Vandament Ave	1975/2019	JAH Realty Elise Lopez	125,465	23,738	18.92%	\$15.00	\$8.00	Buy For Less, Rent-A-Center, Dollar General
Yukon Shopping Center I-40 & Garth Brooks Blvd	2005	Shostak Brothers & Company Rebecca Dragin	211,500	3,200	1.51%	\$14.00	\$16.00	Dollar Tree, Cato
Yukon Village I-40 & Garth Brooks Blvd	2009	Chase Properties Brendon Ruth	332,571	7,500	2.26%	\$12.00	\$25.00	Target, Hobby Lobby, Big Lots, Petsmart
Yukon Village I-40 & Garth Brooks Blvd	2009	Chase Properties Bennett Morrison	332,318	12,967	3.90%	\$0.00	\$0.00	Target, Hobby Lobby, Big Lots, Petsmart
West-Central Totals			4,902,191	358,411	7.31%			

Edmond Submarket Vacancy



Edmond Submarket Absorption



As noted in the summary, the retail market has seen very uneven performance; you can see this through the various submarkets. Edmond includes most national tenants, a number of which have closed stores or downsized, such as Steinmart or Family Video. This along with some small shop closures increased vacancy to 11.9 percent from 8.4 percent a year ago. This is the largest increase in vacancy of any submarket. Because of this uncertainty in the market, there's been no significant new construction. The pandemic and general economic conditions will no doubt constrain new development for some time. We don't view this increase as a weakness of Edmond as much as just bad luck that there was a concentration of retailers hurt by the pandemic. Edmond will continue to be one of the most desired retail submarkets; virtually all multi-store retailers want to be in the market given Edmond's demographics, particularly higher incomes and disposable spending.

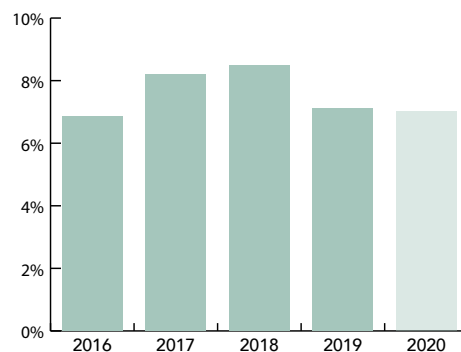
Edmond	Built/Updated	Leasing Agent	Total Space	Avail. Space	Vacant	Rate 1	Rate 2	Anchor Tenants
33rd & Boulevard E 33rd St & S Boulevard St	1982	Lee Segal	49,400	0	0%	\$10.00	\$15.00	Mardel's, Family Dollar
Alta Mesa 301 S Bryant Ave	2008	JAH Realty Elisa Lopez	30,798	9,009	29.25%	\$26.00	\$0.00	Qdoba, OU Medical Center, Panda Express
Berkshire Plaza W 15th St & S Broadway	2002	Creek Commercial Realty, LLC AJ Tolbert/Ethan Slavin	35,612	3,004	8.44%	\$16.00	\$18.00	Office Depot, Nhinja Sushi & Wok
Boulevard Village 3404-3456 S Boulevard St	1985	NAI Sullivan Group Amir Shams/Nathan Wilson	36,173	9,415	26.03%	\$12.00	\$12.00	Mardel's, Family Dollar
Broadway South 3320 S Broadway	1977	Cushman & Wakefield Phillip Farha	61,524	0	0%	\$18.00	\$22.00	Edmond Music
Broadway Square 3601 S Broadway	1968/2006	Land Run Commercial Troy Humphrey/Anna Russell	93,488	6,373	6.82%	\$9.00	\$15.00	City Bites, Duncan Brothers Salon
Bryant Square E 2nd St & N Bryant Ave	1973/1992	JAH Realty Elise Lopez	272,135	54,400	19.99%	\$0.00	\$0.00	Ross, Petco, Party City, Bed Bath & Beyond
Danforth Plaza 2000 W Danforth Rd	2004	Price Edwards & Company George Williams	29,962	6,309	21.06%	\$13.00	\$13.00	State Farm, H&R Block
Danforth Square W Danforth Rd & S Kelly Ave	1999	Land Run Commercial Troy Humphrey	108,000	6,526	6.04%	\$14.00	\$12.00	Hobby Lobby, S&B Burger Joint, My Gym

Edmond	Built/ Updated	Leasing Agent	Total Space	Avail. Space	Vacant	Rate 1	Rate 2	Anchor Tenants
Edmond Crossing 24 E 33rd St	1995	Price Edwards & Company Ev Ernst/George Williams/Girma Moaning	151,664	13,526	8.92%	\$12.00	\$16.00	TJ Maxx, HomeGoods, Tuesday Morning
Edmond Exchange 3233 S Broadway	2003	JAH Realty Elisa Lopez	71,218	19,543	27.44%	\$0.00	\$0.00	On the Border, Sprint, Dunkin Donuts
Edmond Market Place 3301 S Boulevard	1980/2014	Newmark Grubb Levy Strange Beffort Michael Rapella/Jay Cohlmia/Danny Ojeda	96,185	44,257	46.01%	\$15.00	\$21.00	Natural Grocers, Orange Theory Fitness
Edmond Plaza E 15th St & Broadway Ext.	1964/2005	Price Edwards & Company Ev Ernst/George Williams/Girma Moaning	158,373	9,875	6.24%	\$9.00	\$14.00	Westlake Hardware, Big Lots, Goodwill
Edmond Trails 289 S Santa Fe Ave	2007	Sooner Investment Brad Goodwin	25,215	2,000	7.93%	\$14.00	\$14.00	The Bridge Billiards, Kumon Learning Center
Hampton Village 1529 - 1601 S Broadway	2010	The Palmer Company Chris Palmer	22,975	6,779	29.51%	\$22.00	\$20.00	Chipotle, Mattress Firm, AT&T, Luxe
Homestead Center W Danforth & N Santa Fe Ave	2003	Creek Commercial Realty, LLC Ethan Slavin/AJ Tolbert	45,882	7,300	15.91%	\$14.00	\$12.00	Anytime Fitness, Kobe Sushi
Kelly Centre Shopping Center 610 S Kelly Ave	2003	Rock Property Group Ted Holmes/Matthew Hodge	43,763	11,725	26.79%	\$11.50	\$14.00	Dance Makers
Kelly Plaza W Edmond Rd & S Kelly Ave	1984/2011	Newmark Grubb Levy Strange Beffort Jim Rose	86,427	3,352	3.88%	\$9.00	\$15.00	10Gym, Kid's Galaxy
Kickingbird Square 1323 W Danforth Rd	1985/1988	Newmark Grubb Levy Strange Beffort Jim Rose	110,000	4,165	3.79%	\$14.00	\$10.00	Pet Supply Plus, Kickingbird Cinema
Market at Cedar Lake E Waterloo & Broadway	2018	Equity Commercial Realty Josh White/Paul Swales/Eric Fleske	38,020	9,570	25.17%	\$14.00	\$14.00	Subway, Best Cleaners
Market Depot 3409 S. Broadway	1965/2004	Moriah Real Estate Company Brock Lytton	82,235	0	0%	\$16.50	\$24.41	Charleston's, Alfredo's Restaurant
North Oaks 821 W Danforth Rd	1983/1989	Hayes Brokerage Don Hayes	70,672	30,000	42.45%	\$14.00	\$16.00	Dollar General, My Dentist
Oak Brook Shopping Center 2113 W Edmond Rd	2016	Wiggin Properties Grant Stewart/Don Faulkner	86,711	6,221	7.17%	\$9.00	\$14.00	Planet Fitness, The Salvation Army
Oxford Pointe Shops E 2nd St & S Bryant Ave	1986	Newmark Grubb Levy Strange Beffort John Cohlmia	26,500	1,750	6.6%	\$15.00	\$15.00	Vision Center
Pebble Creek W Danforth & N Santa Fe Ave	2001	Owner managed	107,944	0	0%	\$18.00	\$0.00	Kohl's, Gold's Gym, Dollar Tree
Shoppes at Cheyenne Ridge 3308 - 3416 S Bryant Ave	2018	Creek Commercial Realty, LLC Ethan Slavin/AJ Tolbert	27,493	6,723	24.45%	\$22.00	\$26.00	Joey's Cafe, Ellis Island Coffee
Shoppes at Edmond University E 2nd St & S Bryant Ave	2000	Price Edwards & Company George Williams	77,543	1,400	1.81%	\$22.00	\$22.00	WalMart Neighborhood, Pei Wei, Half Price Books
Shoppes at Fox Lake 941 W. I-35 Frontage Road	2016	Price Edwards & Company George Williams	26,802	2,000	7.46%	\$24.00	\$22.00	Ortho Plus, Great Clips
Shoppes On Broadway E 33rd St & S Broadway	2008	Price Edwards & Company Everest Ernst/George Williams/Jacob Simon	160,000	19,533	12.21%	\$16.00	\$22.50	Hobby Lobby, Bella Strada Spa & Salon
Signal Ridge Shopping Center 1700 S Kelly Ave	1986	Price Edwards & Company George Williams	35,000	9,000	25.71%	\$14.00	\$16.00	Daylight Donuts
Spring Creek Plaza E 15th St & S Bryant Ave	2001	CBRE/OKLA Kendra Roberts/Mark Inman/Stuart Graham	63,000	6,148	9.76%	\$32.00	\$31.00	Panera Bread, Fuzzy's Taco Shop
Spring Creek Village of Edmond E 15th St & S Bryant Ave	2007	Price Edwards & Company Ev Ernst/George Williams/Girma Moaning	72,273	28,730	39.75%	\$22.00	\$28.00	Starbucks, Taziki's, Louie's, Lucca, Rustic Cuff
University Plaza E 2nd St & S Bryant Ave	2000	Brady Properties Ali Ghaniabadi	400,000	0	0%	\$14.00	\$16.00	Target Super Center, Lowe's
Uptown Grocery Center 1230 W Covell Rd	2011	KW Commercial Mary Walker	73,350	3,800	5.18%	\$19.00	\$28.00	Uptown Grocery
Willow Creek E 2nd St & N Santa Fe Ave	1985	Owner Managed	31,200	4,700	15.06%	\$18.00	\$0.00	AI Pet Emporium
Edmond Totals			2,907,537	347,133	11.94%			

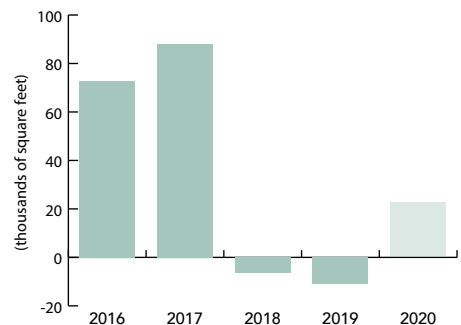


It should not be surprising that the Moore-Norman submarket has held up well, vacancy came in at 7.0 percent, virtually unchanged from last year-end. Most of the big box tenants in this submarket are newer and fewer are in the struggling tenant categories. Combine this with it being a high population growth area and you have a winning combination. As is the case throughout the City, there has been very limited new construction in this submarket and very little anticipated in the year ahead as the market works through the current environment. Sooner Mall continues to have significant vacancy primarily due to the empty Sears. Given the purchase of JCP by a partnership that includes Brookfield & Simon, and that Brookfield owns Sooner Mall, the JCP is expected to remain open and it could very well save the mall from going down a path of co-tenancy issues and lingering questions about its viability. Costco has broken ground in Moore just south of Fritts Farm, further bolstering the Moore retail market. The Moore-Norman submarket has been a highly desirable location for retailers – incomes are good and housing density is high – making it one of the highest retail growth areas of the metro over the last 10 years.

Moore/Norman Submarket Vacancy



Moore/Norman Submarket Absorption



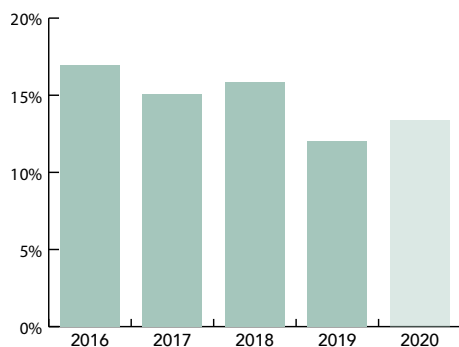
Moore-Norman	Built/Updated	Leasing Agent	Total Space	Available Space	Vacant	Rate 1	Rate 2	Anchor Tenants
550 24th Ave NW	1984/2017	Equity Commercial Realty	31,558	0	0%	\$13.75	\$13.75	Sooner Bowler Center, Remax/Elite
550 24th Ave NW		Judy Hatfield						
Alameda Square	1984	Price Edwards & Company	93,858	17,984	19.16%	\$16.00	\$10.00	Planet Fitness, Dollar Tree
12th Ave SE & E Alameda St		Aaron Diehl						
Anatole Shopping Center	1985	Equity Commercial Realty	64,555	1,250	1.94%	\$15.00	\$16.00	Harbor Freight Tools, Sherwin Williams
12th Ave SE & E Alameda St		Gayla Artman						
Broadway Plaza	2004	Owner Managed	34,000	0	0%	\$10.00	\$14.00	Home Creations
2200 N Broadway St								
Broadway Retail Center	2005	Equity Commercial Realty	50,964	25,920	50.86%	\$13.00	\$13.50	
1700 - 1704 S Broadway		Eric Fleske/Josh White						
Brookhaven Village	1985	Price Edwards & Company	155,016	23,947	15.45%	\$0.00	\$0.00	Chico's, Loft, Louie's, Pub W
36th Ave NW & W Robinson St		Aaron Diehl						
Camden Village	2006/2014	Aria Development, LLC	31,100	9,050	29.1%	\$20.00	\$0.00	Cheers, Therapy in Motion, Okie Tonk Cafe
1003-1035 SW 19th St		Melissa Thomas/Lisa Talley						
Campus Corner Shops	1911/1993	Equity Commercial Realty	225,000	4,165	1.85%	\$16.00	\$18.00	Louie's
301 W Boyd St		Judy Hatfield/Rainey Powell						Lucca
Carriage Plaza	1983	Land Run Commercial	25,500	0	0%	\$16.00	\$16.00	City Bites, Cayman's
2001 W Main St		Troy Humphrey/Anna Russell						
Center on Main	1965	Heather O'Connell	60,000	0	0%	\$0.00	\$0.00	Firestone
500 Main St		Heather O'Connell						

The Cargo Room

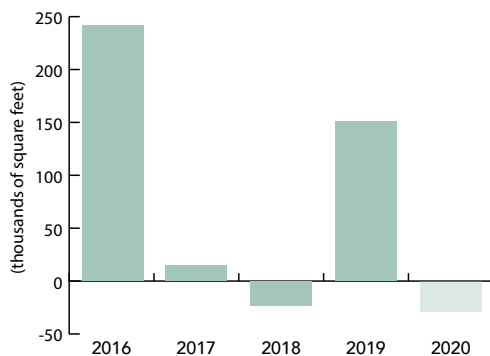
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Moore-Norman	Built/Updated	Leasing Agent	Total Space	Available Space	Vacant	Rate 1	Rate 2	Anchor Tenants
Downtown Shopping Center 555 W Main Street	1974/2009	Brady Properties Ali Ghaniabadi	50,000	0	0%	\$8.00	\$10.00	Sprouts, Cellar Wine and Spirits
Eastmoor Shopping Center 811 SE 4th	2006	Equity Commercial Realty Mark Hyde	25,857	1,017	3.93%	\$12.00	\$13.00	Dollar General, Subway, Cleveland County Health Department
Empire Plaza 3040- 3058 Classen Blvd	2006	HCB Commercial Real Estate Co Scott Heiple	30,000	1,500	5%	\$15.00	\$15.00	Subway, Hearing Aid Express
Fritts Farm SW 19th St & Telephone Rd	2006/2012	Newmark Grubb Levy Strange Beffort Jay Cohlmi/DannyOjeda/Michael Rapella	535,924	3,714	0.69%	\$24.00	\$26.00	Home Depot, Hemisphere's, Target, Dick's, Burlington
Heisman Square 12th Ave SE & E Alameda St	1999	CBRE/OKLA Stuart Graham	93,000	0	0%	\$13.00	\$15.00	Homeland, Ace Hardware, At the Beach
Hollywood Center 1600 W Lindsey St	1964	eXp Realty Wendy Foreman	127,600	0	0%	\$9.00	\$0.00	Homeland Dollar Tree
Madison Square Shopping Center 480 24th NW	2014	CBRE/OKLA Kendra Roberts/Stuart Graham	45,070	23,406	51.93%	\$18.00	\$22.00	BA Fitness, Sherwin Williams, OU Office
Malibu Shopping Center 824 NW 12th St	1975/2010	Gerald Gamble Co. Gerald Gamble	21,000	0	0%	\$12.00	\$0.00	Armstrong McCall, Rent-A-Center
Merkle Creek Plaza 2203 W Main St	1985	Equity Commercial Realty Gayla Artman	33,753	2,239	6.63%	\$15.00	\$18.00	Play It Again Sports, World Acceptance Corp.
Moore Town Center I-35 & SW 19th St	2005	Creek Commercial Realty, LLC Ethan Slavin	35,000	3,762	10.75%	\$18.00	\$16.00	McAlester's, Mazzios Pizza
New City Center 605 N Moore Ave.	1963/1998	Precor Ruffin Rick Pritchett	181,894	15,361	8.45%	\$10.00	\$12.00	Supermercados Morelos, 4 Wheel Parts
Normandy Creek 2200 W Main St	1990	Newmark Grubb Levy Strange Beffort Jay Cohlmi/Danny Ojeda/Michael Rapella	72,670	30,582	42.08%	\$7.00	\$12.00	Gillian Music
North Park Plaza 1024 N Flood	1960	Owner Managed Phoenix Central	37,000	0	0%	\$8.00	\$12.00	Liquor Market
Redbud Plaza 239 & 247 34th Ave SW	1997/2016	Equity Commercial Realty Gayla Artman	24,000	5,943	24.76%	\$16.50	\$18.00	Gymboree
Riverwalk Centre I-35 & SW 19th St	2000	CBRE/OKLA Mark Inman/Stuart Graham	165,665	10,720	6.47%	\$16.00	\$14.00	Kohl's, Gamestop, Catherine's, Urban Air
Riverwalk Plaza 2109-2139 Riverwalk Dr	2000	Precor Ruffin Rick Pritchett	26,939	4,536	16.84%	\$11.57	\$18.00	Integris Physical Therapy, Chelino's
Riverwalk Shops 2713 S I-35 Service Rd	2006	CBRE/OKLA Stuart Graham	33,166	4,200	12.66%	\$20.00	\$20.00	Alfredo's Cox Communications
Robinson Crossing 1300 N Interstate Dr	1986/1989	Brady Properties Ali Ghaniabadi/Mason Ghaniabadi	116,400	18,630	16.01%	\$12.00	\$17.00	Dominos Pizza, The Igloo Event center
Royal Rock 19th & Fritts Blvd.	2015	Avenue CRE Randy Vaillancourt	164,914	2,307	1.4%	\$29.00	\$18.00	Winco, At-Home, Schlotzsky's, AT&T, Five Guys
Shops at Moore 2650 S I-35 Rd	2007/2014	CBRE/OKLA Mark Inman/Stuart Graham/Kendra Roberts	568,679	11,294	1.99%	\$0.00	\$0.00	Ross, Bed Bath & Beyond, Best Buy, Hobby Lobby
Silver Leaf NE 12th St & N Eastern Ave	1985	Bright Star Realty Sun Lee	110,740	6,000	5.42%	\$8.50	\$15.00	Silverleaf Furniture Family Dollar
Sooner Mall I-35 & W Main St	1976/1999	Brookfield Properties Tyler Cassell	511,569	87,500	17.1%	\$0.00	\$0.00	Dillard's, JCPenney, Shoe Dept.
Sooner West/River Oaks Plaza 36th Ave SW & W Main St	1981	Equity Commercial Realty Gayla Artman	68,440	3,000	4.38%	\$16.50	\$17.50	Tuesday Morning, Henry Hudson's Pub
Stubberman Village Elm Ave & Elmwood Dr	1972	University of Oklahoma	33,475	0	0%	\$0.00	\$0.00	Papa John's, Ratcliffe's Bookstore
Suites on Broadway NW 5th St & N Broadway St	1966	Buchanan Realty Steve Buchanan,Debbie Butler	50,000	0	0%	\$11.50	\$12.57	AD, Inc., Moore Escape Room
The Main Center 24th & Main St	2005	HEW Marketing, Inc. Heather Warrington	106,307	0	0%	\$0.00	\$9.00	Hobby Lobby Mardel's
University Town Center 1500 24th Ave NW	2008	CBRE/OKLA Mark Inman/Stuart Graham	1,129,119	11,402	1.01%	\$14.00	\$31.00	Kohl's, Target, Crest, Academy, HomeGoods
West Port Shopping Center 1200 N Santa Fe Ave	1980	T&J Property Management	40,898	3,500	8.56%	\$8.00	\$14.50	Moore Family Clinic, Cash Saver
West Port Shopping Center 1200 N Santa Fe Ave	1980	NAI Sullivan David Hartnack	40,898	0	0%	\$8.00	\$14.50	Moore Family Clinic, GFF Foods
Moore-Norman Totals			5,753,390	403,759	7.02%			

Eastern OK County Submarket Vacancy



Eastern OK Submarket Absorption



Eastern Oklahoma County was another submarket to show a sizable increase in vacancy, to 13.4 percent from 12.1 percent at year-end 2019. And, there will be some more holes in this market as the results of the pandemic filter through the market, like the JCP that may very well close and some local tenant casualties. The health of smaller tenants in this market is a real question mark. Most discounters have a significant presence here and are expected to continue to do well, offsetting some of the local tenant losses. As noted on previous reports, there is structural vacancy in this submarket, much of the product is older with significant deferred maintenance or difficult configurations. The larger spaces in these older centers have proven more difficult to lease. In general, the newer centers in the market perform well.

Eastern OK County	Built/Updated	Leasing Agent	Total Space	Available Space	Vacant	Rate 1	Rate 2	Anchor Tenants
23 Post Plaza NE 23rd St & N Post Rd	1986	Nancy Brewer Nancy Brewer	35,000	0	0%	\$0.00	\$0.00	Spencer's Smokehouse, Farmer's Insurance
Boulevard Marketplace 101 N Douglas Ave	1984	Precor Ruffin Caleb Hill	35,765	9,740	27.23%	\$16.00	\$18.00	Crest Grocery, Dollar Tree
Choctaw Plaza 14407 NE 23rd St	1974/1984	Newmark Grubb Levy Strange Beffort Michael Almaraz	131,000	54,508	41.61%	\$6.95	\$8.00	Chase Bank, Dollar General
Decker Center 1200 S Air Depot Blvd	1982	Interwest Realty George Huffman	36,365	6,326	17.4%	\$13.00	\$14.00	World Finance, Red River Credit
Del City Crossing I-40 & Sooner Rd	2012	CBRE/OKLA Stuart Graham	24,200	2,400	9.92%	\$20.00	\$20.00	Ted's Cafe Escondido, The Garage, Volcano Sushi
Del Crest Center SE 15th & I-40	1957/2016	NAI Sullivan Group David Hartnack/SamSwanson/ Nathan Wilson	95,563	12,900	13.5%	\$17.00	\$19.00	Family Dollar, Harbor Freight
Del Crest Shops SE 15th & Sunnyslane	1957/2016	Price Edwards & Company Ev Ernst/Jacob Simon	59,000	38,364	65.02%	\$0.00	\$0.00	Dollar Tree
Dickson Plaza SE 15th St & S Post Rd	1978/1980	Midwest Business Investments Joe Leon	34,900	0	0%	\$8.00	\$0.00	Shapes Gym, Farmer's Insurance
Eastgate Shopping Center 1100 N Midwest Blvd	1965	Equity Commercial Realty Mark Hyde	51,520	31,980	62.07%	\$7.00	\$7.00	Queen's Beauty Supply

Eastern OK County	Built/Updated	Leasing Agent	Total Space	Available Space	Vacant	Rate 1	Rate 2	Anchor Tenants
Gateway Plaza SE 15th & S Air Depot Blvd	1985	Owner Managed Bobbie Tritten	87,512	23,315	26.64%	\$8.00	\$15.00	Ollie's Outlet, Dollar Tree
Hartsdel Shops SE 44th St & S Bryant Ave	1995	eXp Realty Ethan Walker	49,726	2,300	4.63%	\$4.00	\$7.00	Family Dollar, Beauty Supply
Heritage Plaza 351 N Air Depot Blvd	1987	Avenue CRE Randy Vaillancourt	75,071	21,327	28.41%	\$6.00	\$8.00	Select Physical Therapy, Economy Hearing Aid
Hilltop Village 1100 S Air Depot Blvd	1974/2015	Equity Commercial Realty Mark Hyde	86,652	24,705	28.51%	\$520.00	\$12.00	The Dance Department, Los Vacqueros
Northeast Town Center 1124 NE 36th St	1970/2017	eXp Realty Ethan Walker	93,825	28,483	30.36%	\$4.00	\$10.00	Dollar Tree, Buy For Less, Ice Events Center & Grill
Oakcliff Shopping Center 3102 SE 44th Street	1966	Charles Shadid Charles Shadid	51,200	0	0%	\$5.00	\$7.00	Tom's Tires Karen's Treasures
Park Estates NE 36th & N Kelly Ave	1952	Owner managed Usman Rashid	38,000	8,800	23.16%	\$0.00	\$0.00	Beauty Town
Park Plaza 3700 Springlake Dr	1993	eXp Realty Ethan Walker	38,399	0	0%	\$3.00	\$8.00	Diva Beauty Supply
Sooner Market Place E Reno Ave & N Sooner Rd	1995	eXp Realty Ethan Walker	63,063	5,480	8.69%	\$5.00	\$7.00	Chelino's
Sooner Rose SE 15th & Sooner Road	2016/2019	Sooner Development Brad Goodwin	496,988	6,943	1.4%	\$12.00	\$25.00	Hobby Lobby, Burlington, Academy
Spencer's Center NE 23rd St & N Spencer Rd	2000	Charles Shadid Charles Shadid	40,000	10,000	25%	\$5.00	\$7.00	Conoco
Sunnylane Plaza SE44th St & S Sunnylane Rd	1979		84,888	44,000	51.83%	\$6.00	\$5.00	Advance America, Family Dollar
Tan & Tone America Center 1900 S Air Depot Blvd	2005	Ta Real Estate	25,300	0	0%	\$7.00	\$12.00	Uptown Thrift, Mid-Del Complete Dental Care
Tenth Street Plaza 9207 NE 10th St	1960	Owner Managed	33,000	0	0%	\$6.00	\$0.00	Dollar General
Town & Country Center E Reno Ave & N Air Depot Ave	1966/1989	Price Edwards & Company Karleen Krywucki/Jacob Simon	133,916	7,900	5.9%	\$9.50	\$16.00	Ross, Big Lots, Ace Hardware, Aarons
Town Center Plaza SE 29th St & S Air Depot Blvd	2005	Sooner Investment Brad Goodwin	795,000	3,000	0.38%	\$24.00	\$0.00	Target, J C Penney, Lowe's, Kohl's
Uptown Plaza 7430 SE 15th St	1958/2006	Price Edwards & Company Karleen Krywucki/Everest Ernst/Jacob Simon	194,033	54,070	27.87%	\$0.00	\$0.00	Langston's, Family Dollar, Tuesday Morning, Locke Supply
Village Oak Plaza 1000 S Douglas Blvd	1981	Nicholas Commercial Cole Ream	27,500	0	0%	\$10.00	\$8.00	Lupe's Restaurant, Papa Johns Pizza
Village Shopping Center 4718 - 4754 SE 29th St	1973	Newmark Grubb Levy Strange Beffort Danny Ojeda/Jay Cohlmlia/ Michael Rapella	31,634	2,500	7.9%	\$10.00	\$12.00	Rent-A-Center, Village Quality Foods, Akropolis Greek Restaurant
Westminster Shopping Center 2401 N Westminster	1963	Owner Managed	58,000	4,000	6.9%	\$5.00	\$6.00	23rd Street Auction, Thomas Miles Millwork, Ratti Kool Print Shop
Eastern OK County Totals			3,007,020	403,041	13.40%			



“ There is a gap between what sellers see as value and buyers are willing to pay. ”

What a year... the uncertainty brought on by the pandemic, the continued energy downturn and the election have significantly curtailed retail investment sales. The sale of Greenbriar Square at the end of the second quarter, ended up being the largest sale of the year. There is no doubt that the pandemic and the changes it is bringing to retail are a big reason for the lack of activity. There have been over forty national tenant bankruptcies this year. Many local tenants are struggling and there are questions about potential changes in consumer behavior – all of which inject uncertainty into retail and, particularly, investment sales. This despite the fact that overall retail sales are holding up much better than expected and there are a significant number of retailers doing very well – discounters, grocery stores, home improvement stores, etc.

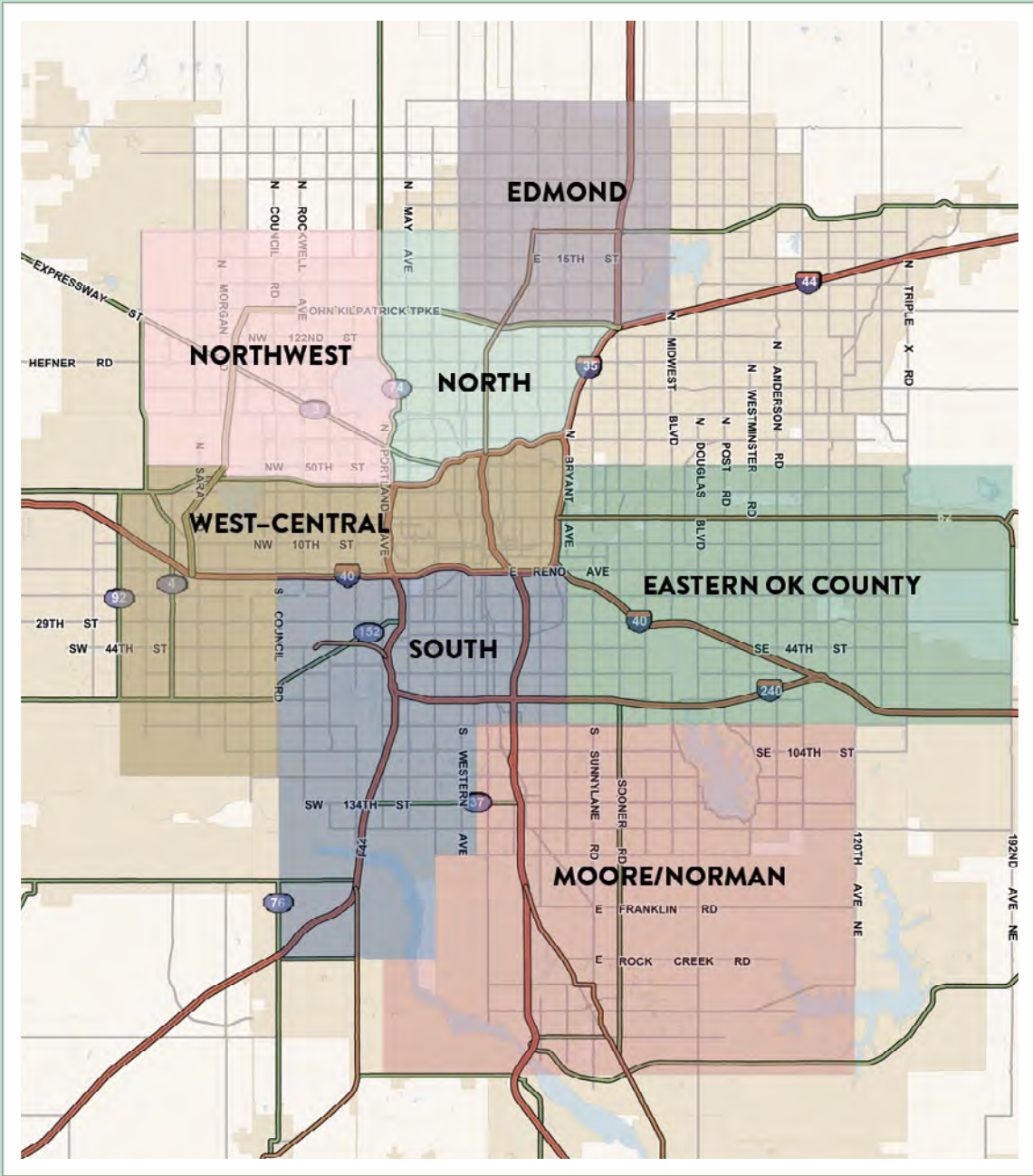
There is a general sense that capitalization rates have risen, perhaps 100 to 150 basis points if not more, but the market hasn't seen enough transactions to verify this figure or stabilize the market. Several opportunity funds have been put together anticipating both the rise in cap rates and the potential for distressed asset sales. To date, this has not translated to increased sales volume. There is a gap between what sellers see as value and buyers are willing to pay. On the distressed side, the opportunities just aren't here yet... it takes a while for problems to work down from tenants to owners to lenders, expect more next year. You should also expect the uncertainty in the market to continue, although there is beginning to be some confidence that by mid-year, the market will have begun to stabilize with more widespread vaccinations and the beginning of the end of the pandemic.

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OKC METRO SHOPPING CENTER SALES

Property	Address	Submarket	Building SF	Sales Price	Price PSF	Sale Date
Kelly Center	610 Kelly Ave	Edmond	42,700	\$3,700,000	\$87	1/24/20
MacArthur Shops	5801 W Britton Road	North	26,050	\$1,900,000	\$73	2/6/20
West Port Shopping Center	1201-1227 N Santa Fe Ave	Moore	48,866	\$2,500,000	\$51	2/19/20
Mayfair Village	5012-5030 N May Ave	Northwest	127,107	\$5,000,000	\$43	3/12/20
Greenbriar Shopping Center	12230 S Pennsylvania Ave	South	37,076	\$10,865,000	\$293	6/24/20
Park Estate Shopping Center	1027-1041 NW 36th	Northeast	34,646	\$400,000	\$12	7/30/20
Quail Village	14101 N May Ave	North	24,695	\$6,268,499	\$254	10/7/20
Boulevard Market Place	101 N Douglas Blvd	Mid Del	35,765	\$3,800,000	\$106	11/12/20
Cornerstone Crossing	3907 -3939 N Macarthur	Northwest	73,791	\$5,478,834	\$74	12/30/20



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