

Balancing tech growth and real estate stability in your portfolio

Publié le 14 août 2025

Baoqi Zhu

Associate Director, Quantitative Research & Multi Asset Solutions

Points clés

- WTRE targets real estate assets aligned with tech-driven structural trends like data centres, telecom infrastructure, and e-commerce logistics, differentiating it from traditional REIT benchmarks.
- Due to its tech-focused approach, WTRE has demonstrated higher year-to-date performance and estimated long-term earnings growth than traditional real estate indices.
- Compared with pure technology indices, WTRE offers comparatively lower volatility and higher dividend yields, providing a balanced risk-return profile.
- The strategic inclusion of next-generation digital infrastructure and telecom satellites further positions WTRE to benefit from emerging technological trends and supportive macroeconomic conditions.
- Related Products [WisdomTree New Economy Real Estate UCITS ETF – USD Acc](#), [WisdomTree New Economy Real Estate UCITS ETF – USD](#) [Find out more](#)

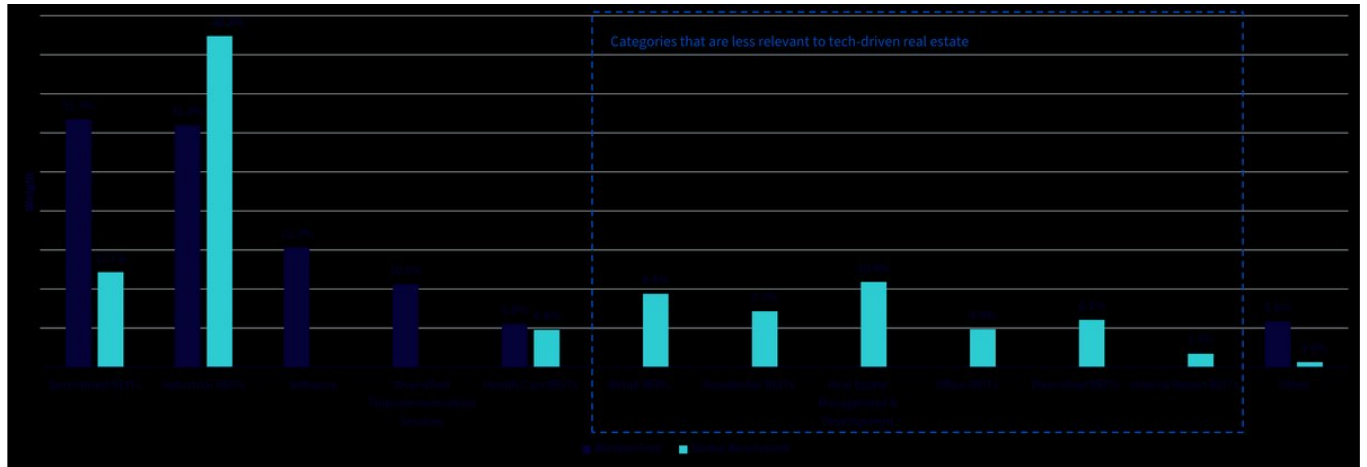
When you think of real estate investing, traditional images of office towers, residential apartments, or shopping malls might spring to mind. Yet today, the real momentum is in assets that power the digital economy – data centres, logistics hubs, and telecom infrastructure. These new economy assets aren't just reshaping landscapes but redefining the real estate investment opportunity.

Shifting away from traditional assets

The real estate landscape is evolving, with traditional sectors influenced by economic cycles and shifting consumer behaviours. However, tech-driven real estate, including logistics facilities underpinning e-commerce, telecom infrastructure, and data centres, benefits from robust long-term structural growth drivers such as digitalisation, cloud computing, and accelerating data consumption.

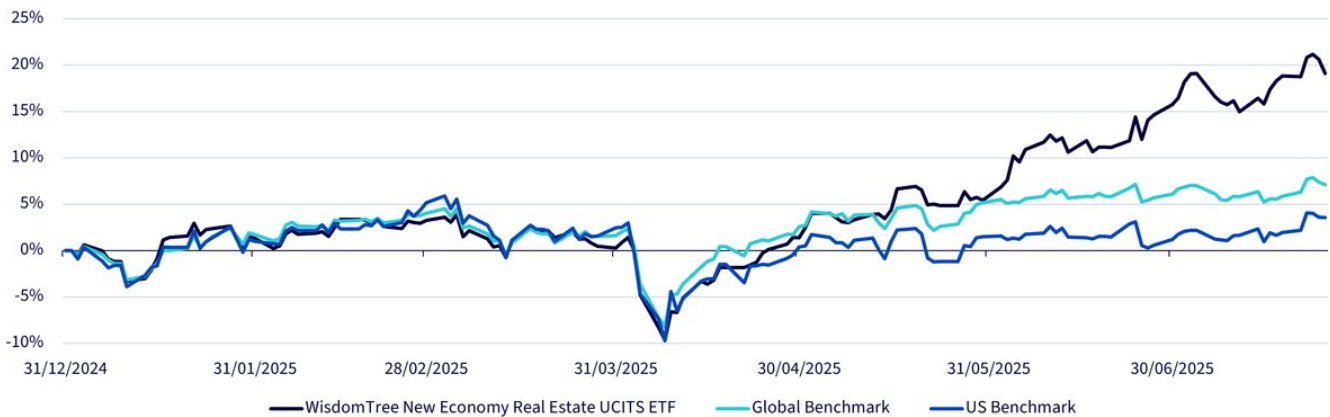
[WisdomTree New Economy Real Estate UCITS ETF \(WTRE\)](#)'s industry composition distinctly reflects this strategic orientation, with a substantial allocation to specialised REITs like data centres and telecom towers, industrial REITs supporting e-commerce logistics, and direct investments in software and related technology services. On the contrary, the global REITs benchmark FTSE EPRA/Nareit Developed Index allocates around 40% to segments that are less driven by tech, such as retail REITs, residential REITs

etc. This intentional industry tilt away from less tech-driven real estate sectors ensures greater alignment with durable tech growth trends.

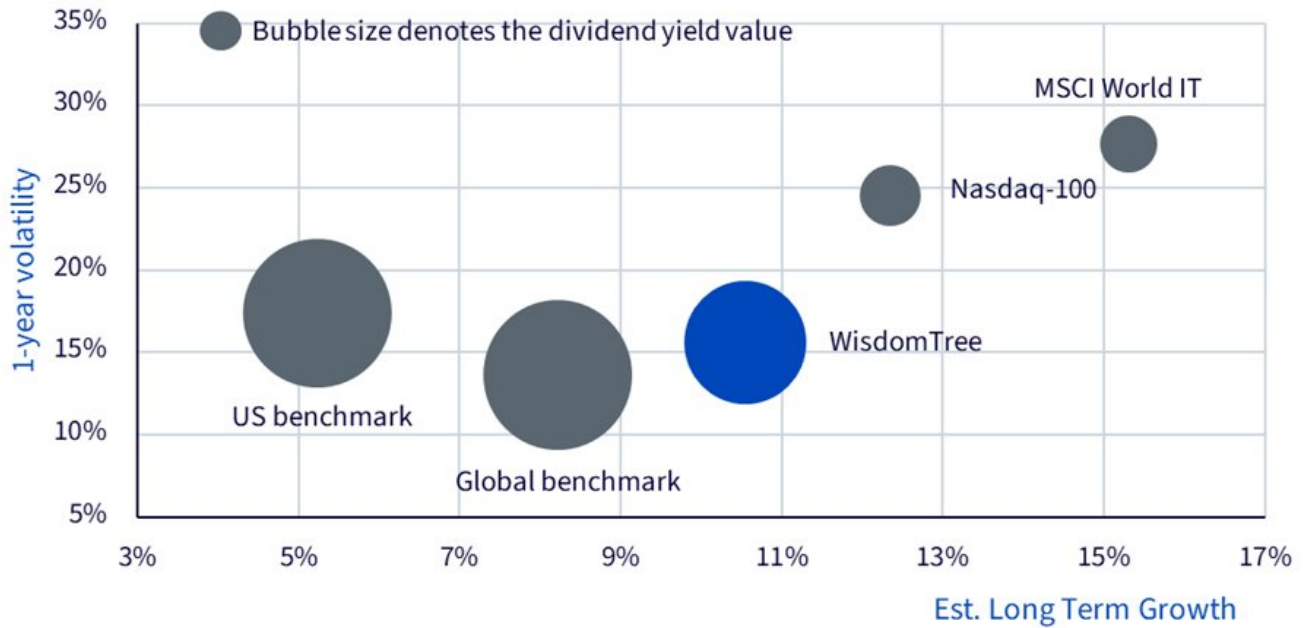


Balancing growth, volatility, and income

WTRE's strategic emphasis on tech-driven assets has translated into significant comparative advantages. WTRE has notably higher estimated long-term growth than traditional real estate benchmarks, benefiting directly from the secular tech trends underpinning its portfolio. WTRE returned around 19% year-to-date¹, more than double that of broad REIT benchmarks such as FTSE EPRA NAREIT Developed Index and FTSE NAREIT All Equity REITs Index.



Benefiting from its tech-driven portfolio, WTRE also exhibits higher forward-looking growth. Its estimated long-term earnings growth is approximately 10.6%², surpassing both global and US real estate benchmarks. Additionally, compared to pure technology indices like the Nasdaq-100 or MSCI World IT, WTRE provides a superior balance by offering substantially higher dividend yields (2.7% vs. less than 0.7% for tech indices)³ And notably lower one-year volatility.

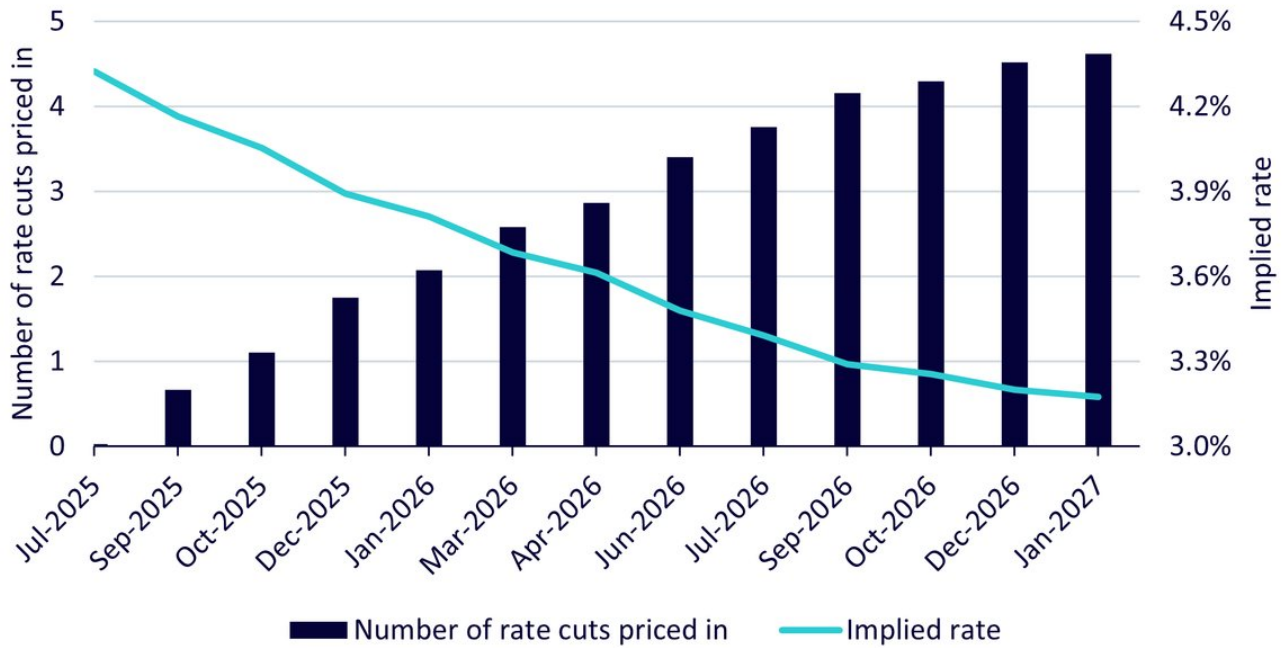


Thus, WTRE occupies a unique position, capturing tech-driven growth while maintaining real estate-like stability and income. Investors looking to harness the growth of technology with reduced volatility and steady dividends will find WTRE uniquely well-positioned.

Macro backdrop supports real assets

The macroeconomic environment has become increasingly favourable for tech-driven real estate. As of 25 July 2025, market expectations, derived from US Federal Funds Futures prices, indicate approximately 4-5 rate cuts expected before the end of 2026, bringing the implied federal funds rate down to around 3.2%⁴. Historically, lower interest rates have enhanced the appeal of dividend-paying investments by reducing financing costs and increasing asset valuations.

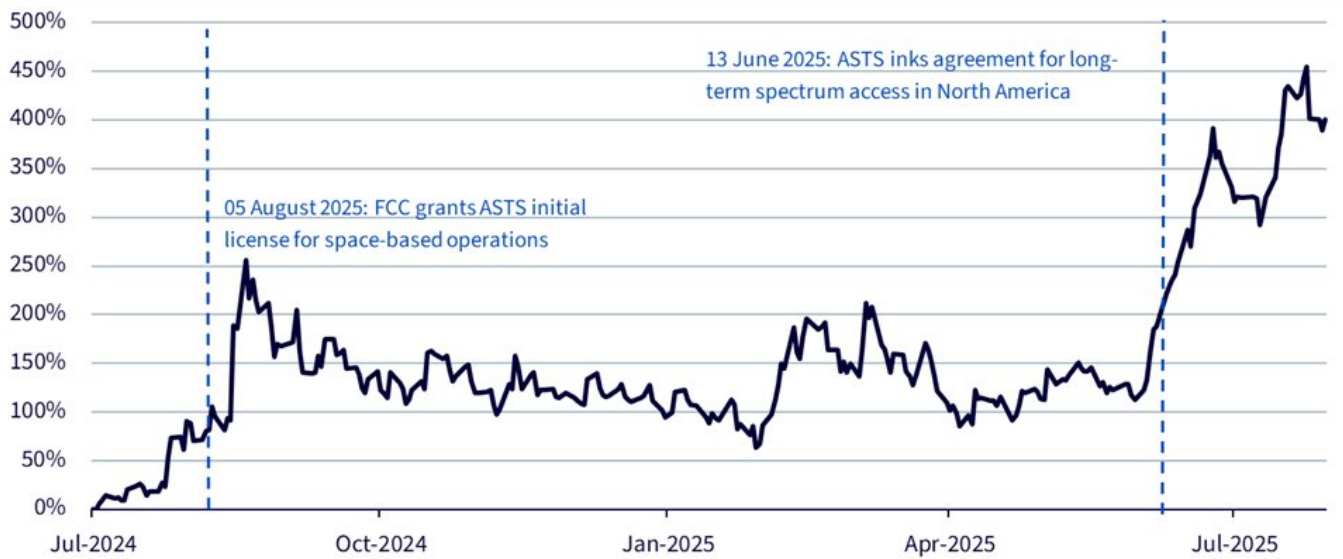
Although the US Federal Reserve has not signalled further easing, employment and inflation have relatively stabilised. Once the Fed decides to adopt a more dovish policy, the real estate sector and WTRE will benefit from that catalyst.



Strategic index enhancement: telecom satellites take centre stage

To deepen thematic alignment with tech megatrends, WisdomTree [switched WTRE's underlying index](#) early this year by introducing two new groups: next-generation digital infrastructure and telecom satellites. Next-generation digital infrastructure includes blockchain-enabled data centres, crypto-mining facilities, and other high-performance computing infrastructures, capitalising on rising digital asset adoption and blockchain technologies.

Meanwhile, telecom satellite infrastructure significantly enhances connectivity. While traditional telecom towers provide critical ground-based infrastructure, satellite telecom companies, such as AST SpaceMobile (ASTS), extend connectivity into space. Advances in direct-to-cell technology allow modern smartphones to receive signals directly from satellites, significantly broadening the potential customer base. Including these strategic new groups diversifies the fund and aligns it firmly with cutting-edge technological trends.



Conclusion

As the real estate sector continues to evolve, tech-driven assets provide opportunities to access growth segments while offering dividend income and relatively lower volatility compared to pure technology strategies. [WisdomTree New Economy Real Estate UCITS ETF \(WTRE\)](#) stands uniquely positioned to capture these opportunities, providing targeted exposure to the infrastructure powering tomorrow's new economy. Investors seeking a balance between long-term growth, dividend income, and reduced volatility relative to technology equities may consider WTRE as part of their portfolio strategy.

1Source: Bloomberg, as of 25 July.

2Source: Bloomberg, as of 25 July 2025.

3Source: Bloomberg, as of 25 July 2025.

4Source: Bloomberg, as of 25 July 2025.

Important Risks Related to this Article

IMPORTANT INFORMATION

Marketing communications issued in the European Economic Area (“EEA”): This document has been issued and approved by WisdomTree Ireland Limited, which is authorised and regulated by the Central Bank of Ireland. **Marketing communications issued in jurisdictions outside of the EEA:** This document has been issued and approved by WisdomTree UK Limited, which is authorised and regulated by the United Kingdom Financial Conduct Authority. WisdomTree Ireland Limited and WisdomTree UK Limited are each referred to as “WisdomTree” (as applicable). Our Conflicts of Interest Policy and Inventory are available on request. This marketing communication has been prepared for professional investors, but the WisdomTree products set out in this document may be available in some jurisdictions to any investors, subject to applicable laws and regulations. As the product may not be authorised or its offering may be restricted in your jurisdiction, it is the responsibility of every person or entity to satisfy themselves as to the full observance of the laws and regulations of the relevant jurisdiction. Prior to any application investors are advised to take all necessary legal, regulatory, tax and investment advice on the suitability and consequences of an investment in the products. Past performance is not a reliable indicator of future performance. Any historical performance included in this document may be based on back testing. Back testing is the process of evaluating an investment strategy by applying it to historical data to simulate what the performance of such strategy would have been. Back tested performance is purely hypothetical and is provided in this document solely for informational purposes. Back tested data does not represent actual performance and should not be interpreted as an indication of actual or future performance. The value of any investment may be affected by exchange rate movements. Any decision to invest should be based on the information contained in the appropriate prospectus and after seeking independent investment, tax and legal advice. These products may not be available in your market or suitable for you. The content of this document does not constitute investment advice nor an offer for sale nor a solicitation of an offer to buy any product or make any investment. An investment in exchange-traded products (“ETPs”) is dependent on the performance of the underlying index, less costs, but it is not expected to match that performance precisely. ETPs involve numerous risks including among others, general market risks relating to the relevant underlying index, credit risks on the provider of index swaps utilised in the ETP, exchange rate risks, interest rate risks, inflationary risks, liquidity risks and legal and regulatory risks. The information contained in this document is not, and under no circumstances is to be construed as, an advertisement or any other step in furtherance of a public offering of shares in the United States or any province or territory thereof, where none of the issuers or their products are authorised or registered for distribution and where no prospectus of any of the issuers has been filed with any securities commission or regulatory authority. No document or information in this document should be taken, transmitted or distributed (directly or indirectly) into the United States. None of the issuers, nor any securities issued by them, have been or will be registered under the United States Securities Act of 1933 or the Investment Company Act of 1940 or qualified under any applicable state securities statutes. This document may contain independent market commentary prepared by WisdomTree based on publicly available information. Although WisdomTree endeavours to ensure the accuracy of the content in this document, WisdomTree

does not warrant or guarantee its accuracy or correctness. Any third party data providers used to source the information in this document make no warranties or representation of any kind relating to such data. Where WisdomTree has expressed its own opinions related to product or market activity, these views may change. Neither WisdomTree, nor any affiliate, nor any of their respective officers, directors, partners, or employees accepts any liability whatsoever for any direct or consequential loss arising from any use of this document or its contents. WisdomTree Issuer ICAV This document may contain forward looking statements including statements regarding our belief or current expectations with regards to the performance of certain assets classes and/or sectors. Forward looking statements are subject to certain risks, uncertainties and assumptions. There can be no assurance that such statements will be accurate and actual results could differ materially from those anticipated in such statements. WisdomTree strongly recommends that you do not place undue reliance on these forward-looking statements. The products discussed in this document are issued by WisdomTree Issuer ICAV ("WT Issuer"). WT Issuer is an umbrella investment company with variable capital having segregated liability between its funds organised under the laws of Ireland as an Irish Collective Asset-management Vehicle and authorised by the Central Bank of Ireland ("CBI"). WT Issuer is organised as an Undertaking for Collective Investment in Transferable Securities ("UCITS") under the laws of Ireland and shall issue a separate class of shares ("Shares") representing each fund.

The Fund is described in a Key Information Document (KID) or Key Investor Information Document (KIID) for UK investors, and the prospectus of WT Issuer ("WT Prospectus"). A copy of the WT Prospectus and the KID / KIID is available, for EEA/UK only, in English at www.wisdomtree.eu. Where required under national rules, the KID will also be available in the local language of the relevant EEA Member State. Investors should read the WT Prospectus before investing and should refer to the section of the WT Prospectus entitled »Risk Factors¼ for further details of risks associated with an investment in the Shares. The [summary of investor rights](#) associated with an investment in the fund is available in English on WisdomTree Europe¼s website. WisdomTree Management Limited may decide to terminate the arrangements made for the marketing of its collective investment undertakings. In such circumstances, shareholders in the affected EEA Member State will be notified of this decision and will be provided with the opportunity to redeem their shareholding in the fund free of any charges or deductions for at least 30 working days from the date of such notification. Notice to Investors in Switzerland – Qualified Investors This document constitutes an advertisement of the financial product(s) mentioned herein. The prospectus and the key investor information documents (KIID) are available from WisdomTree¼s website <https://www.wisdomtree.eu/en-ch/resource-library/prospectus-and-regulatory-reports> Some of the sub-funds referred to in this document may not have been registered with the Swiss Financial Market Supervisory Authority ("FINMA"). In Switzerland, such sub-funds that have not been registered with FINMA shall be distributed exclusively to qualified investors, as defined in the Swiss Federal Act on Collective Investment Schemes or its implementing ordinance (each, as amended from time to time). The representative and paying agent of the sub-funds in Switzerland is Société Générale Paris, Zurich Branch, Talacker 50, PO Box 5070, 8021 Zurich, Switzerland. The prospectus, the key investor information documents (KIID), the articles of association and the annual and semi-annual reports of the sub-funds are available free of charge from the representative and paying agent. As regards distribution in Switzerland, the place of jurisdiction and performance is at the registered seat of the representative and paying agent. For Investors in France:

The information in this document is intended exclusively for professional investors (as defined under the MiFID) investing for their own account and this material may not in any way be distributed to the public. The distribution of the Prospectus and the offering, sale and delivery of Shares in other jurisdictions may be restricted by law. WT Issuer is a UCITS governed by Irish legislation, and approved by the Financial Regulatory as UCITS compliant with European regulations although may not have to comply with the same rules as those applicable to a similar product approved in France. The Fund has been registered for marketing in France by the Financial Markets Authority (Autorité des Marchés Financiers) and may be distributed to investors in France. Copies of all documents (i.e. the Prospectus, the Key Investor Information Document, any supplements or addenda thereto, the latest annual reports and the memorandum of incorporation and articles of association) are available in France, free of charge at the French centralizing agent, Societe Generale at 29, Boulevard Haussmann, 75009, Paris, France. Any subscription for Shares of the Fund will be made on the basis of the terms of the prospectus and any supplements or addenda thereto. **For Investors in Malta:** This document does not constitute or form part of any offer or invitation to the public to subscribe for or purchase shares in the Fund and shall not be construed as such and no person other than the person to whom this document has been addressed or delivered shall be eligible to subscribe for or purchase shares in the Fund. Shares in the Fund will not in any event be marketed to the public in Malta without the prior authorisation of the Maltese Financial Services Authority. **For Investors in Monaco:** This communication is only intended for duly registered banks and/or licensed portfolio management companies in Monaco. This communication must not be sent to the public in Monaco.