



Press Release

For immediate release

Invesco Expands Private Markets Access for Defined Contribution Market with Launch of Core Plus Real Estate Collective Investment Trust

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ATLANTA, February 26, 2026 – Invesco Ltd., a leading global asset management firm, today announced the launch of the Invesco Core Plus Real Estate Trust, a collective investment trust (CIT) exclusively designed to provide defined contribution (DC) plans access to private real estate through a daily valued structure purpose-built for retirement portfolios.

The Invesco Core Plus Real Estate Trust is designed to provide exposure to core plus private real estate managed by Invesco Real Estate, complemented by an allocation to passive U.S. REITs to support daily liquidity. The Trust is structured as a daily valued CIT, enabling efficient implementation within defined contribution plans while supporting long-term strategic allocations within retirement portfolios.

“Private market strategies have gained attention among retirement plan sponsors and participants in recent years,” said Greg Jenkins, Managing Director of DC Solutions, Invesco. “Historically, these strategies in DC plans have been limited. The Invesco Core Plus Real Estate Trust offers sponsors and asset allocators a scalable way to incorporate core plus real estate into DC plans in alignment with long-term retirement objectives.”

The Invesco Core Plus Real Estate Trust is trustee and managed by Invesco Trust Company and sub-advised by Invesco Advisers, Inc. The CIT is intended for use exclusively within professionally managed DC solutions, such as target date funds and managed account portfolios. It is designed for a broad range of plan types and sizes, including large DC plans and pooled employer plans (PEPs) with custom target date funds, off-the-shelf target date fund providers, and managed account solutions.

Expanding Access to Private Markets

Private markets, including real estate, have long been used in defined benefit plans, yet defined contribution plans allocate less than 1% to the category, according to industry surveys¹. Private real estate can offer several potential benefits for retirement portfolios. A core plus real estate approach further expands the opportunity set through broader geographic and sector diversification.

“As one of the first dedicated core plus private real estate CITs, the Trust introduces institutional real estate capabilities that support the long-term needs of defined contribution investors,” said Scott Dennis, Global Head of Private Markets, Invesco. “Drawing on our decades of real estate expertise, the CIT reflects our ongoing commitment to expanding access to private markets for retirement plan participants.”

Supporting Plan Sponsors

Invesco supports plan sponsors and retirement professionals with research and educational resources designed to help them evaluate how private market strategies may be thoughtfully incorporated into defined contribution plans. Insights from [Invesco's 2026 Defined Contribution Participant Pulse Survey](#) show that more than 85% of participants are either definitely or maybe interested in having private market investments included in their employer-sponsored retirement plan,

with a majority indicating greater comfort when access is provided through professionally managed solutions such as managed accounts or target date funds.

About Invesco Private Markets

Invesco Private Markets is a global leader in private real estate, private credit, and alternative investment solutions, helping investors create resilient portfolios and unlock new opportunities. With more than four decades of experience, the platform delivers innovative strategies, streamlined access, and investor education for wealth management, retirement, and institutional clients. Invesco Private Markets manages \$131 billion in AUM as of December 31, 2025.

About Invesco Real Estate

Invesco Real Estate is a global leader in the real estate investment management business with \$84.2 billion in real estate assets under management, 605 employees and 21 regional offices across the U.S., Europe and Asia Pacific as of September 30, 2025. With over a 40-year history, Invesco Real Estate, part of Invesco Private Markets, invests across the risk return spectrum, from core to opportunistic; in equity and debt; listed and direct; locally and globally. Invesco Real Estate is a business name of Invesco Advisers, Inc., an indirect, wholly owned subsidiary of Invesco Ltd.

About Invesco Trust Company

Invesco Trust Company, a wholly owned subsidiary of Invesco Ltd., is a Texas state-chartered trust company serving as trustee to a suite of collective investment trusts with over \$89 billion in assets invested across 80 group trusts funds. Invesco Trust company launched its first fund in 1987.

About Invesco Ltd.

Invesco Ltd. is one of the world's leading asset management firms serving clients in more than 120 countries. With US\$2.2 trillion in assets under management as of Dec. 31, 2025, we deliver a comprehensive range of investment capabilities across public, private, active, and passive. Our collaborative mindset, breadth of solutions and global scale mean we're well positioned to help retail and institutional investors rethink challenges and find new possibilities for success. For more information, visit www.invesco.com.

¹ Source: The Callan Index, September 30, 2025

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