Summary: Health Care REIT Inc. Apr 14

Description: Abstract
Our 'BBB' rating on Health Care REIT Inc. (HCN) is derived from: Our anchor of 'bbb' based on our "satisfactory" business risk and "intermediate" financial risk profile assessments for the company. Analytical modifiers had no impact on the rating outcome. One of the largest healthcare REITs with ownership of a large and diverse portfolio of healthcare facilities with good long-term demand fundamentals. Tenant concentration has increased, but rent coverage remains adequate. REIT Investment Diversification and Empowerment Act of 2007 (RIDEA) investments represent about one-third of invested capital, which we view as potentially more volatile than triple net leased investments. Credit metrics are improving following a period of aggressive growth. Debt is predominately fixed rate with a long tenor. Adequate liquidity, ...

Companies mentioned in this report are:
- Welltower Inc.

Action: Review

Standard and Poors RatingsXpress Credit Research provides in-depth coverage of international corporates, financial institutions, insurance companies, utilities, sovereigns and structured finance programs. RatingsXpress Credit Research lets users determine the credit rating of holdings and identify key factors underlying an issuer’s creditworthiness, distinguishes the different risk exposures for new and existing deals, and provides an understanding of how their analysts interpret key regulatory, political and environmental events and their economic impact.

This product consists of a Summary Analysis: Bi-annual (at least). An abbreviated analysis containing Standard & Poor’s issuer credit ratings as of the time the article was published. The analysis includes a rating rationale - the basis on which the rating was assigned - and an outlook section if the issuer is not on CreditWatch. Financial statistics are not included.

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