US Data Center Daily Briefing

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KEY THEMES

- Starwood SOF XIII $10.2B final close names data centers in asset mix
- Echelon Data Centres 50% stake funded through Fund XII and SREIT, not SOF XIII
- Starwood Digital Ventures 1.5 GW pipeline built on ~$8B across multiple vehicles
- India met record 256.1 GW peak April 2026, softening data-center power scarcity case

Starwood's $10.2B SOF XIII names data centers — the Echelon platform sits in Fund XII

Starwood Capital said on July 1, 2026 that it closed its latest opportunistic real estate fund, Starwood Distressed Opportunity Fund XIII, with capital commitments in excess of $10.2 billion. The firm named data centers among the fund's targeted asset classes and said it has already closed or committed to 20 transactions, committing more than $3 billion of equity. The release describes an initial portfolio with data-center investments spanning the United States, Europe and Asia. The clearest named data-center platform in Starwood's public record, Echelon Data Centres, is funded through earlier vehicles — Starwood Opportunity Fund XII and Starwood Real Estate Income Trust.

- Starwood closes SOF XIII at $10.2B, names data centers in target mix – Starwood Capital reports 20 transactions closed or committed and more than $3 billion of equity deployed as of the July 1, 2026 final close.
- Starwood Digital Ventures anchors a 1.5 GW pipeline – the January 2024 launch release put Starwood's data-center commitments at ~$8 billion across 1.5 GW, drawing on "various Starwood Investment Vehicles."
- Echelon Data Centres stake sits in Fund XII and SREIT – Starwood committed ~$850 million for a 50% stake in the European platform in February 2024, alongside a €900 million Morgan Stanley/UOB debt facility.
- India met a record 256.1 GW peak on April 25, 2026 without shortage – the Ministry of Power said it expects to meet demand of around 270 GW over the year, softening the "India power scarcity" case for data centers.
- RDSS smart-meter rollout: 3.90 crore installed as of Dec 31, 2025 – against 19.79 crore sanctioned, with AT&C losses improved from 21.91% in FY2021 to 15.04% in FY2025.

- CEA transmission plan targets 900+ GW non-fossil integration by 2035-36 – the planning document frames a large grid buildout underpinning India's forward demand projections.

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