

RESIDENTIAL MARKET OVERVIEW
(June 30, 2017 to June 30, 2018)

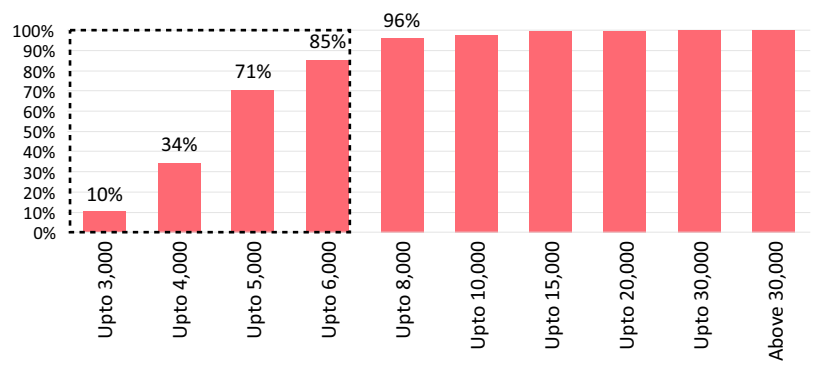
BENGALURU:

New launches trigger three-fold increase in supply, frenzy among investors

MONTHS INVENTORY (months)

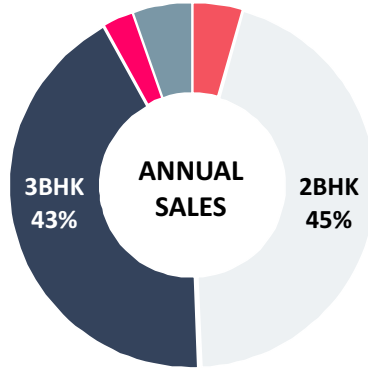
5BHK	61
4BHK	49
3BHK	41
2BHK	35
1BHK	43

CUMULATIVE SALES AS PER PRICE BRACKET

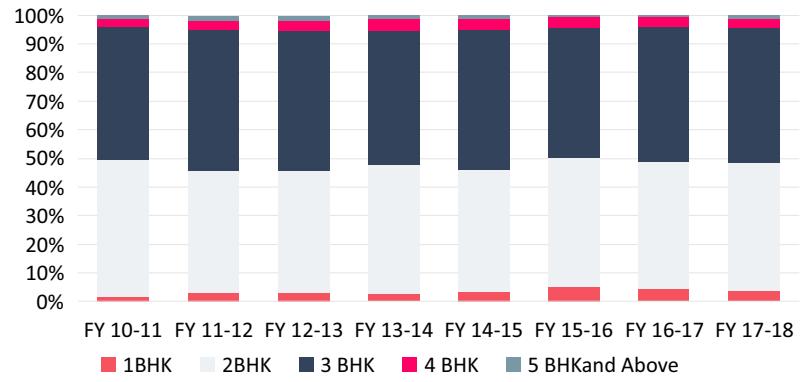


ANNUAL SALES: 45.04million sqft ▲ 8% Improvement
MONTHS INVENTORY:39months ▲ 9% Improvement

- Among all unit types, 2BHKs accounted for highest sales (45%).
- Apartments priced at rates below Rs 6,000/ sqft bagged about 85% of the entire market sales.
- Preference for 2BHK continues to prevail.



PRODUCT SHIFT (SALES)



SUBURB PERFORMANCE

SUBURB	SALES (MN. SQFT)	PRICE (PSF)	VARIATION	MI (MONTHS)
OUTER EAST	10.71	5,242	▲ 3%	45
OUTER NORTH	7.99	5,494	— -	58
PERIPHERY SOUTH	7.59	4,056	▲ 5%	39
OUTER SOUTH	5.36	5,281	— -	36
PERIPHERY EAST	4.98	4,420	▼ -2%	39
PERIPHERY NORTH	3.15	5,302	▲ 1%	41
INNER EAST	1.32	7,951	▲ 2%	43
INNER WEST	0.94	7,643	▲ 1%	30
INNER NORTH	0.89	9,337	▲ 4%	33
OUTER WEST	0.75	4,108	▲ 1%	44
INNER SOUTH	0.62	10,078	— -	39
CENTRAL	0.58	15,699	— -	48
PERIPHERY WEST	0.08	4,170	▲ 8%	28

TOP LOCATIONS

BOMMASANDRA

Annual Sales: 1.66 million sqft
Avg Price: 3,453 PSF
1,610 units

TUMKUR-BIEC

Annual Sales: 1.22 million sqft
Avg Price: 4,709 PSF
1,034 units

GUNJUR-BALAGERE

Annual Sales: 1.37 million sqft
Avg Price: 5,148 PSF
1010 units

DEVANAHALLI

Annual Sales: 1.07 million sqft
Avg Price: 4,946 PSF
823 units

Locations in the Periphery North like Bommasandra and Devanahalli contribute 7% out of the total saleable area in the city.

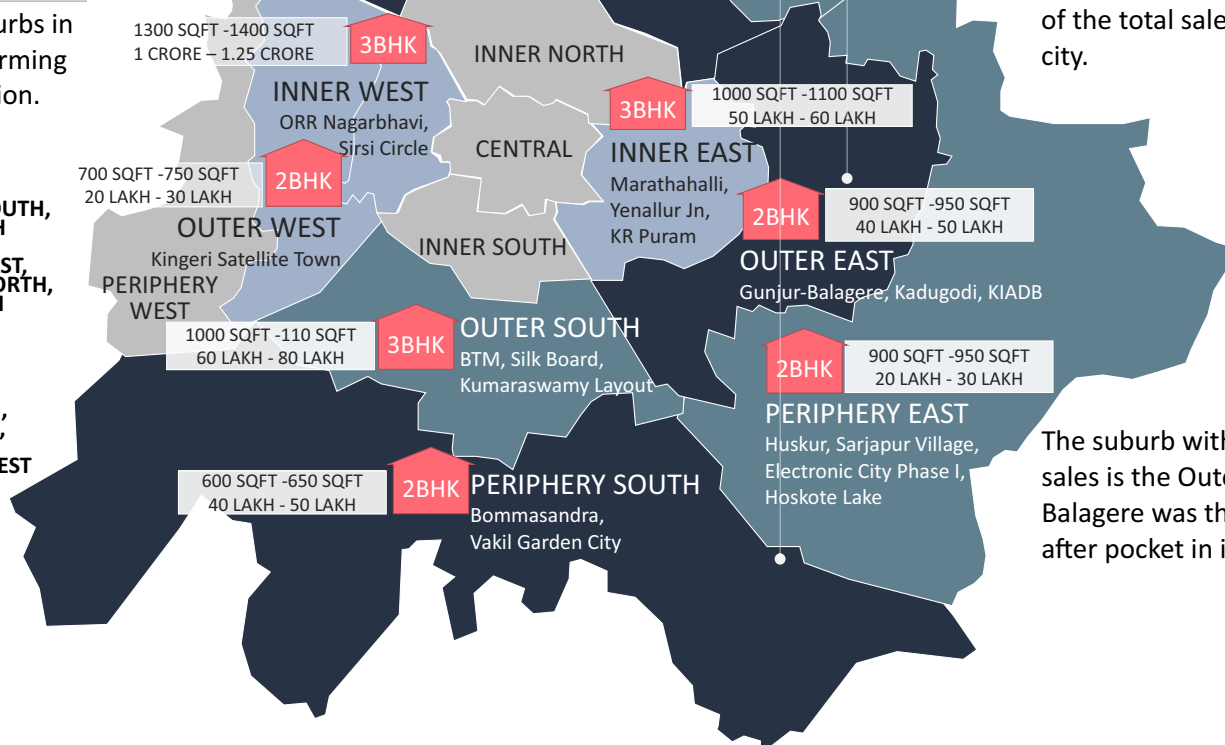
WHAT'S TRENDING?

INDICATION OF VARIATION IN PRICE OF NEW SUPPLY
▲ INCREASE — CONSTANT ▼ DECREASE
MI: Months Inventory (months)

Graphic shows various suburbs in Bengaluru, their best performing unit type and its specification.

ANNUAL SALES(UNITS)

ABOVE 5,000	OUTER EAST, PERIPHERY SOUTH, OUTER NORTH
1,000-5,000	PERIPHERY EAST, PERIPHERY NORTH, OUTER SOUTH
500 -1,000	INNER EAST, OUTER WEST, INNER WEST
BELOW 500	INNER NORTH, INNER SOUTH, CENTRAL, PERIPHERY WEST



The suburb with the highest sales is the Outer East. Gunjur-Balagere was the most sought after pocket in it.