



# REAL INSIGHT Residential

Annual Round-up 2024



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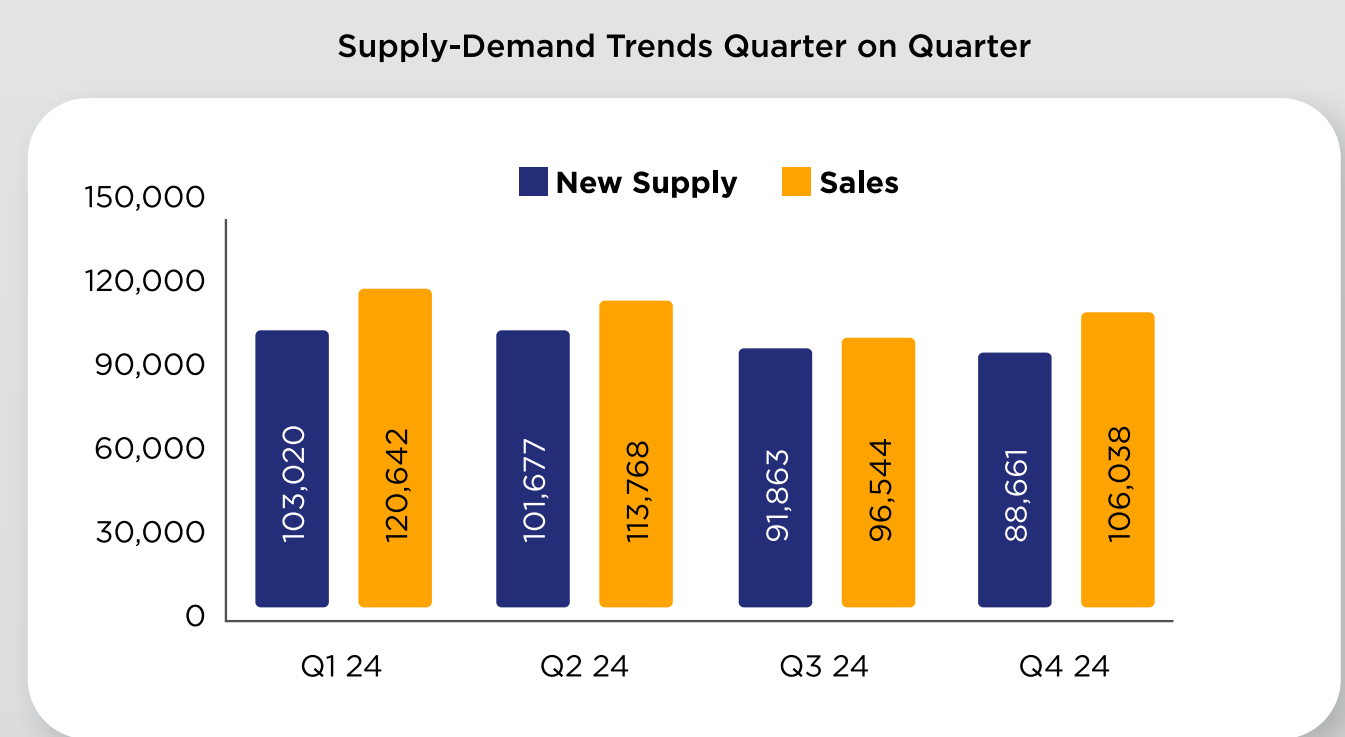
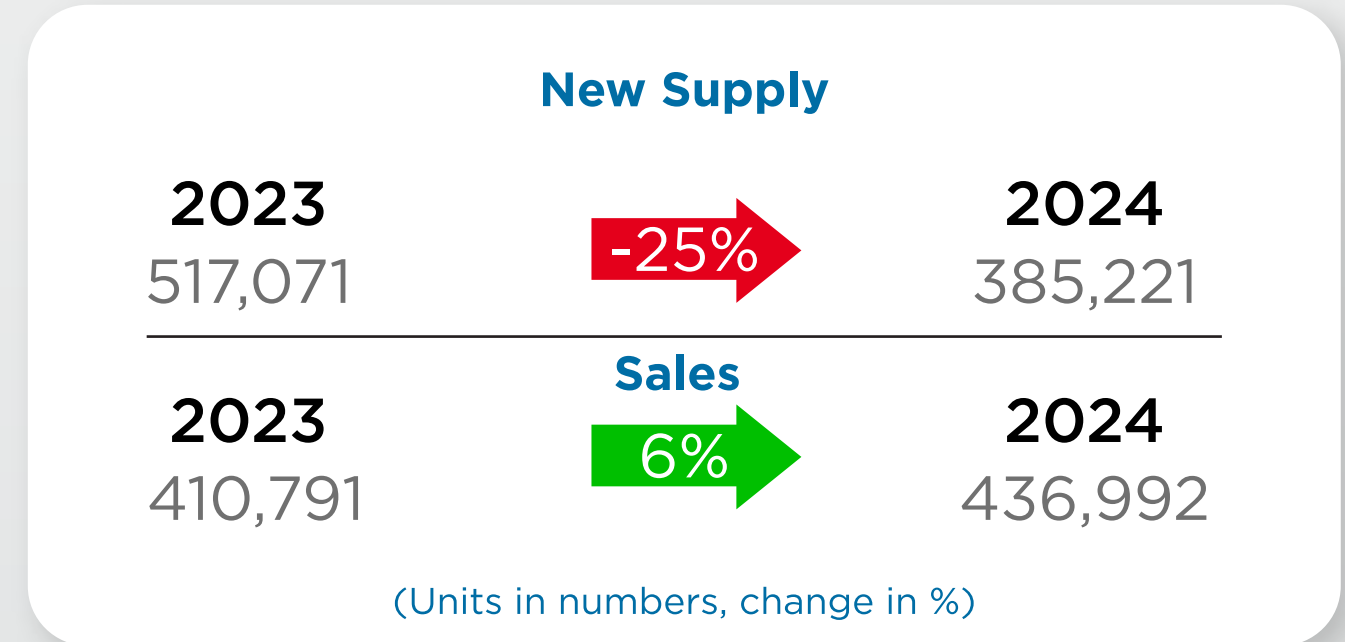


# OVERVIEW

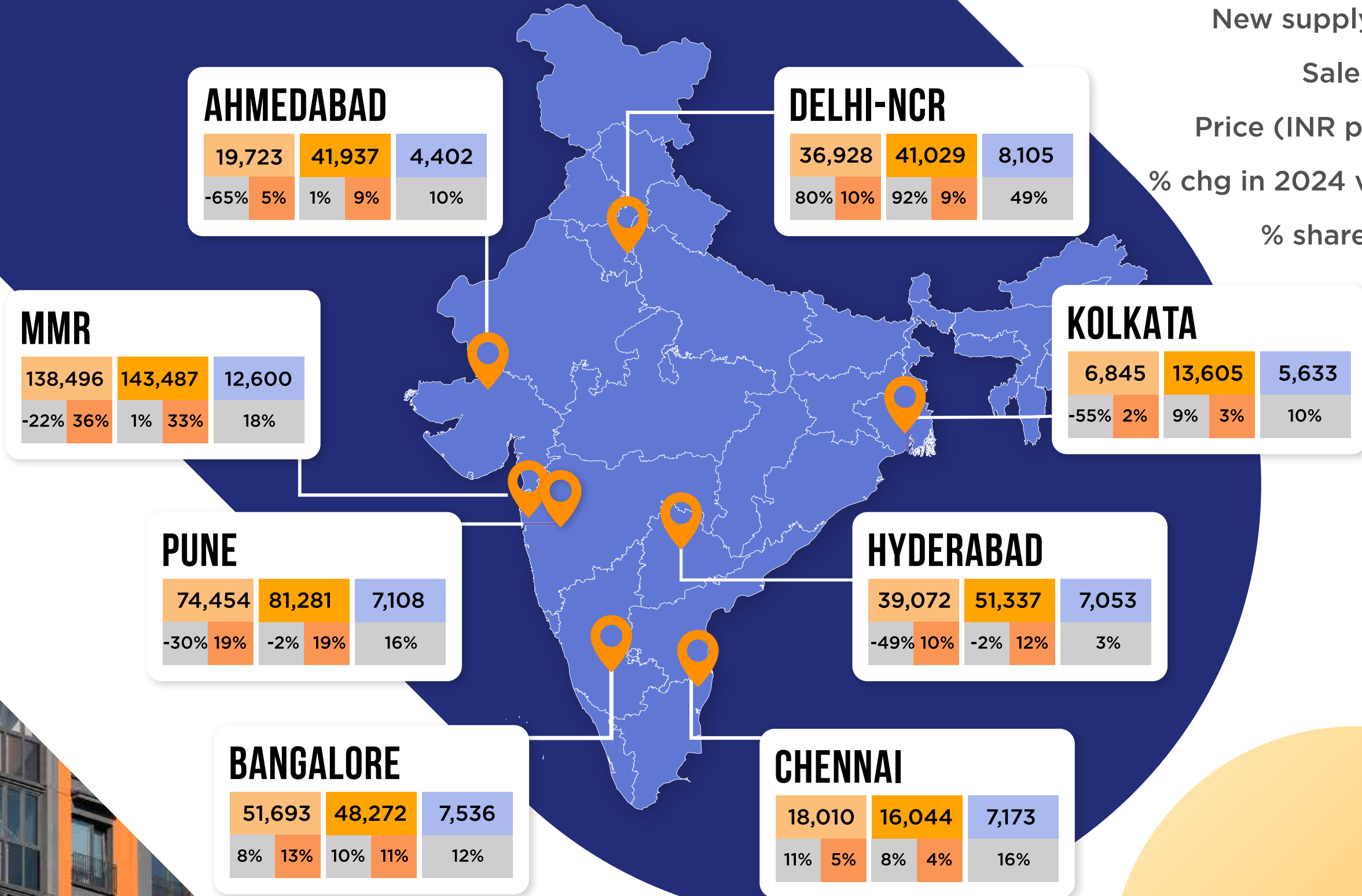
- The Indian economy is forecast to grow at 6.4% in FY25, the lowest since the pandemic-induced contraction of 5.8% in FY21. A slowdown in investment has forced the government to forecast a growth rate lower than both the Reserve Bank of India's and government's initial predictions.
- However, the government expects the construction sector and the financial, real estate and professional services sector to experience strong growth. The construction sector's Real GVA is projected to rise by 8.6% while the financial, real estate and professional services sector is expected to grow by 7.3%.
- High base effect resulted in housing sales moderating in the October-December quarter year-on-year. Slower pace of project approvals caused by state elections in Maharashtra and Haryana during the quarter also affected fresh supply, with new launches showing an annual dip.
- A positive investor sentiment along with the rising cost of building materials keeps fuelling the price rally. Average property values continued to grow during the quarter even as labour became more expensive. Private estimates show average construction cost has risen nearly 40% in the past 4 years due to a significant increase in these two crucial components.
- Key performance metrics point towards resilience and underlying demand, with unsold housing stock showing an annual dip as on December 31.



## ALL INDIA RESIDENTIAL ACTIVITY



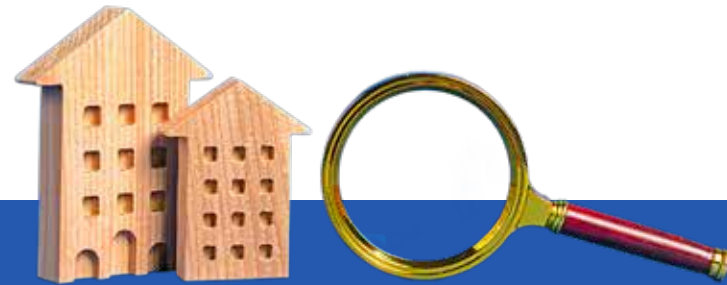
# RESIDENTIAL MARKET SNAPSHOT 2024



New supply (units) ■  
 Sales (units) ■  
 Price (INR per sq ft) ■  
 % chg in 2024 v/s 2023 ■  
 % share in total ■

# NEW SUPPLY

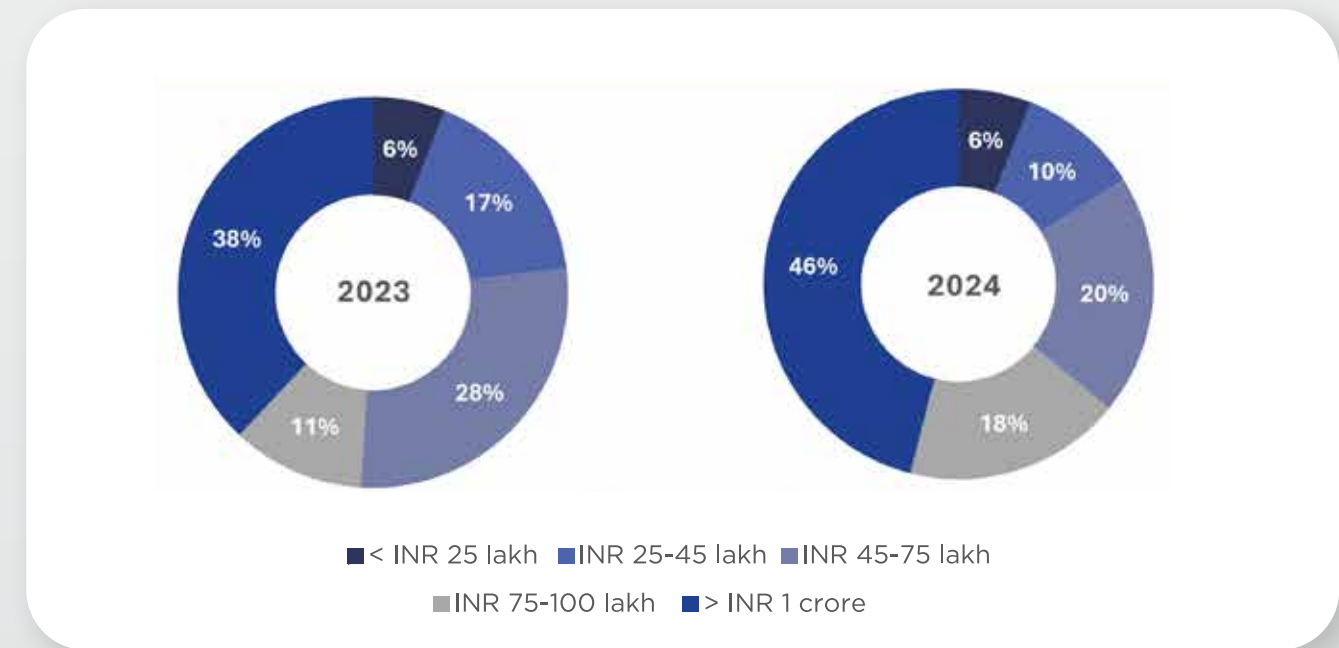
- Over 3.85 lakh units were launched across India's top-8 cities during 2024, 25% lower than the previous year.
- Mumbai, Pune and Bengaluru have been the frontrunners, taking a combined share of 69% in the overall launches in 2024.
- Share of properties within INR 45 lakh fell from 23% in 2023 to 16% in 2024 while the share of properties worth INR 1 crore and above grew from 38% in 2023 to 46% in 2024.



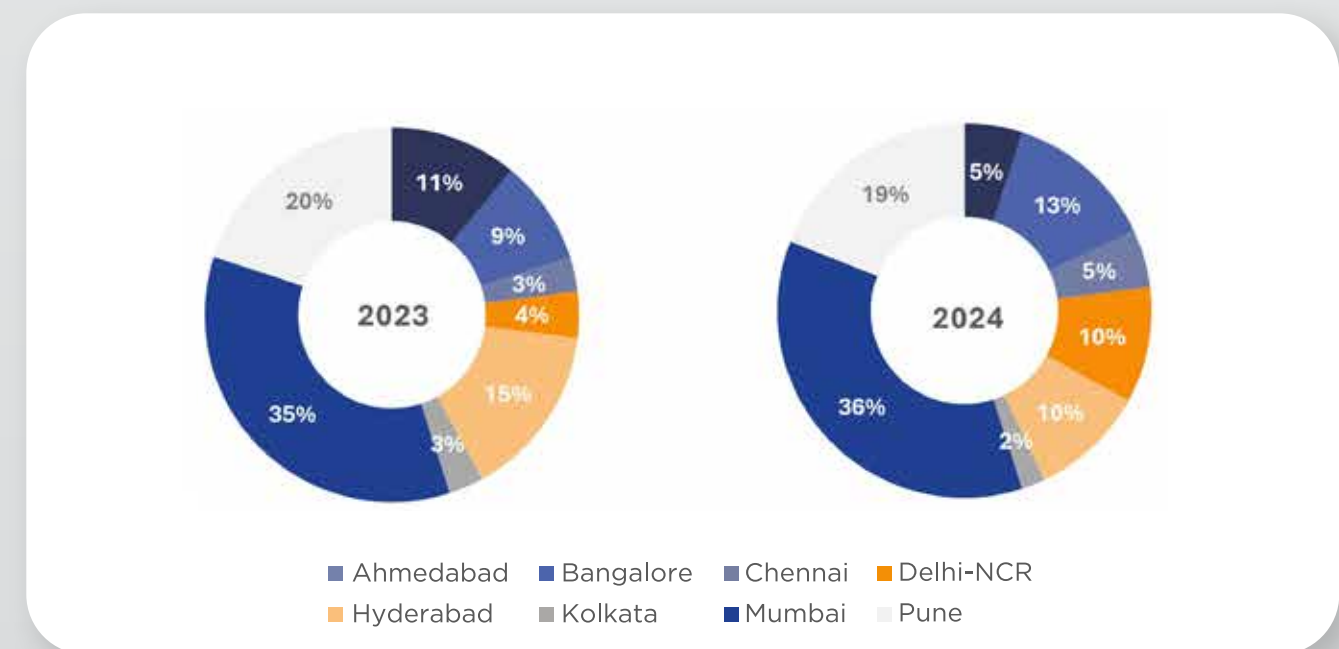
Top 5 Localities based on New Launches in 2024

Rank	Locality Name	City	Price Range (INR/Sq ft.)	Most Launched Ticket Size	Most Launched Configuration	Units Launched
1	Navi Mumbai	MMR	9,000 - 9,500	45-75 Lakh	2BHK	7,603
2	Beyond Thane	MMR	5,200 - 6,200	45-75 Lakh	1BHK	4,987
3	Pune West	Pune	6,000 - 7,000	Above 1 Crore	2BHK	4,886
4	Mira Road & Beyond	MMR	6,200 - 6,800	Above 1 Crore	1BHK	4,752
5	Andheri to Dahisar	MMR	17,000 - 18,000	Above 1 Crore	2BHK	3,970

## Ticket-wise Split of Launches



## City-wise Share of Launches



# SALES

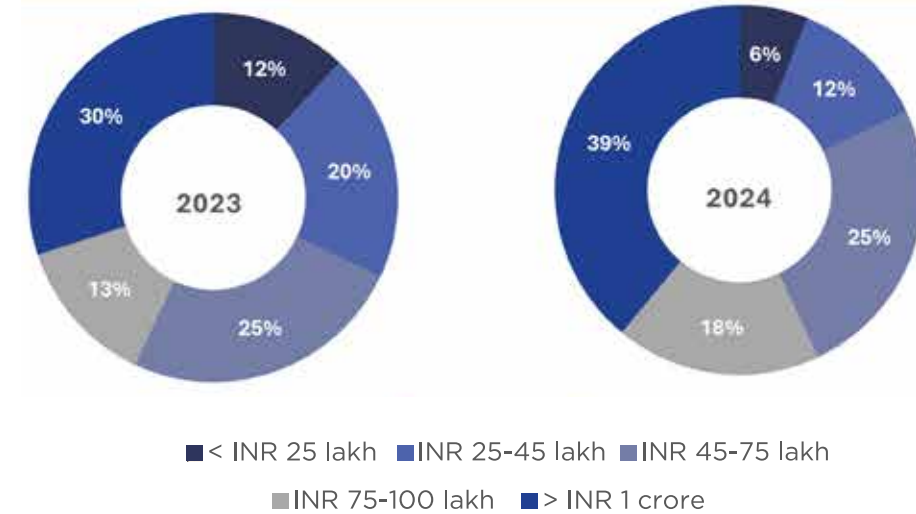
- Residential sales grew 6% YoY in 2024, with a total 4.36 lakh units sold during the period. Barring Hyderabad and Pune, all other top markets in India registered an annual growth in property demand in 2024 versus 2023.
- Mumbai and Pune continued to witness the highest traction, taking a combined share of 52% in overall sales in 2024.
- Delhi-NCR saw the highest annual growth of 92% in 2024, followed by Bengaluru and Kolkata with YoY growth of 10% and 9%, respectively.



Top 5 Localities based on Sales in 2024

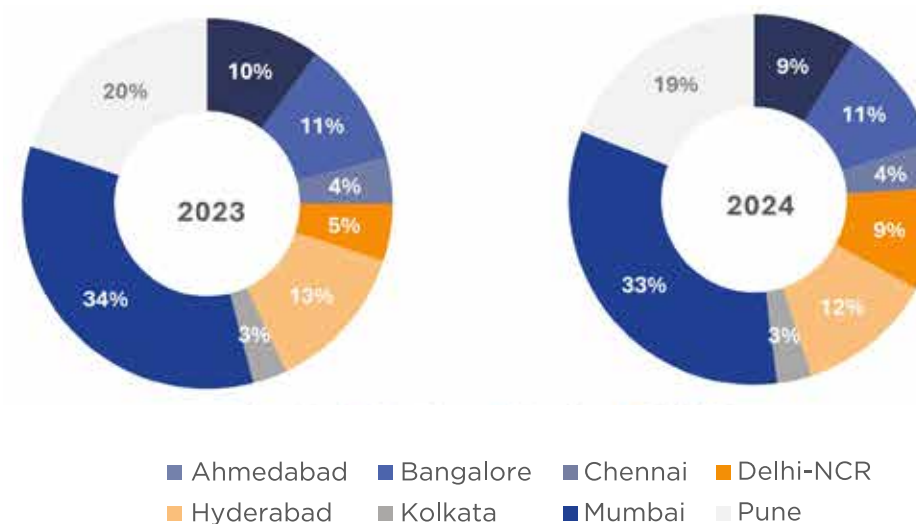
Rank	Locality Name	City	Price Range (INR/Sq ft.)	Most Sold Ticket Size	Most Sold Configuration	Units Sold
1	Beyond Thane	MMR	5,200 - 6,200	25-45 Lakh	1BHK	6,559
2	Hyderabad West	Hyderabad	7,200 - 7,800	Above 1 Crore	3BHK	5,598
3	Navi Mumbai	MMR	9,000 - 9,500	Above 1 Crore	1BHK	4,334
4	Mira Road & Beyond	MMR	6,200 - 6,800	25-45 Lakh	1BHK	4,308
5	Hyderabad North	Hyderabad	7,000 - 7,500	Above 1 Crore	3BHK	4,122

## Ticket-wise Split of Sales



■ < INR 25 lakh ■ INR 25-45 lakh ■ INR 45-75 lakh  
■ INR 75-100 lakh ■ > INR 1 crore

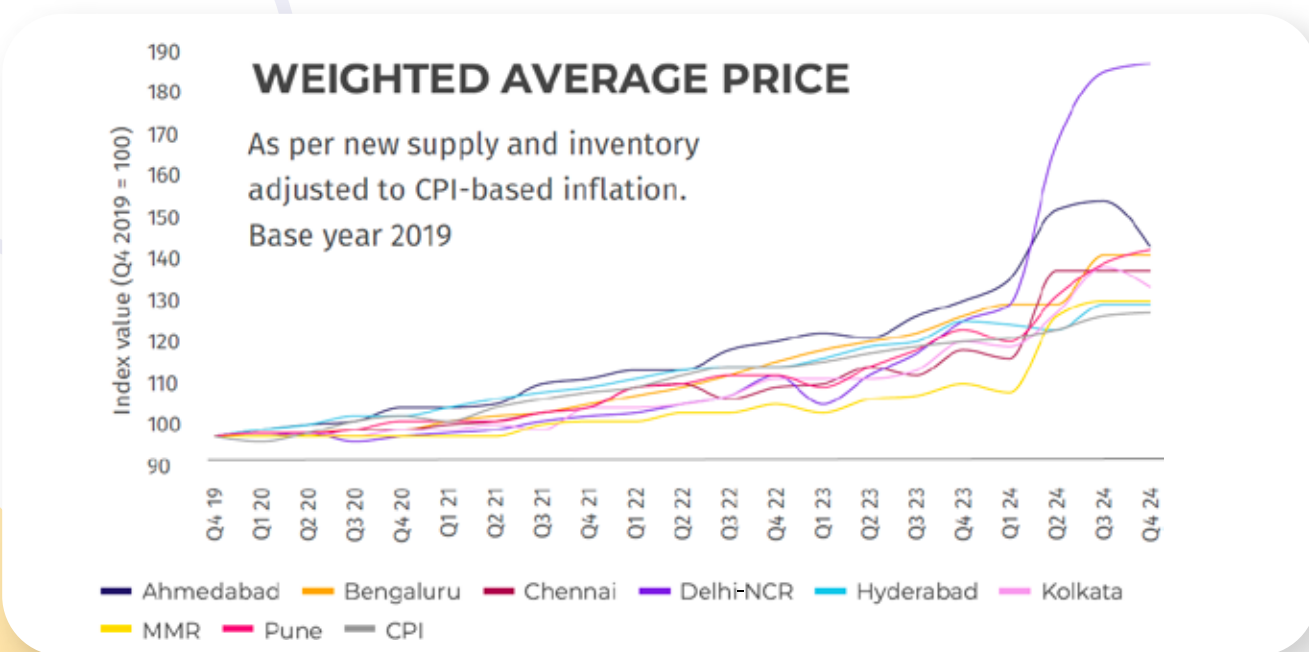
## City-wise Share of Sales



■ Ahmedabad ■ Bangalore ■ Chennai ■ Delhi-NCR  
■ Hyderabad ■ Kolkata ■ Mumbai ■ Pune

# PRICES

- In the past one year, average property values increased across cities, albeit in varying degrees. While price growth was marginal in Hyderabad after nearly a decade of sharp rise, all other cities covered in the analysis showed double-digit annual appreciation.
- Average property values in India's national capital region showed a whopping 49% appreciation in the past one year as demand for luxury homes continued to sustain in this residential market amid a spike in the number of high-net worth individuals.
- The city-wise price growth is indicative of underlying demand, future prospects and a positive buyer sentiment. However, cost pressure might deepen affordability concerns in a country, where a large part of the population relies on subsidies for their house purchases.



# INVENTORY

- The significant rise in average prices notwithstanding, demand for housing in the country remains robust as reflected by a quarterly (-2%) as well as annual dip (-5%) in the pan-India unsold stock.
- Mumbai (37%), Pune (16%) and Hyderabad (14%) together make up for the largest share in this stock.
- An uptick in launches has pushed the inventory overhang — the period required to sell off the existing stock, keeping in view the current sales velocity — has increased to 25 months compared to 23 months last year.
- While Hyderabad (29 months) has the highest inventory overhang, Ahmedabad (17 months) and Kolkata (17 months) have the lowest.

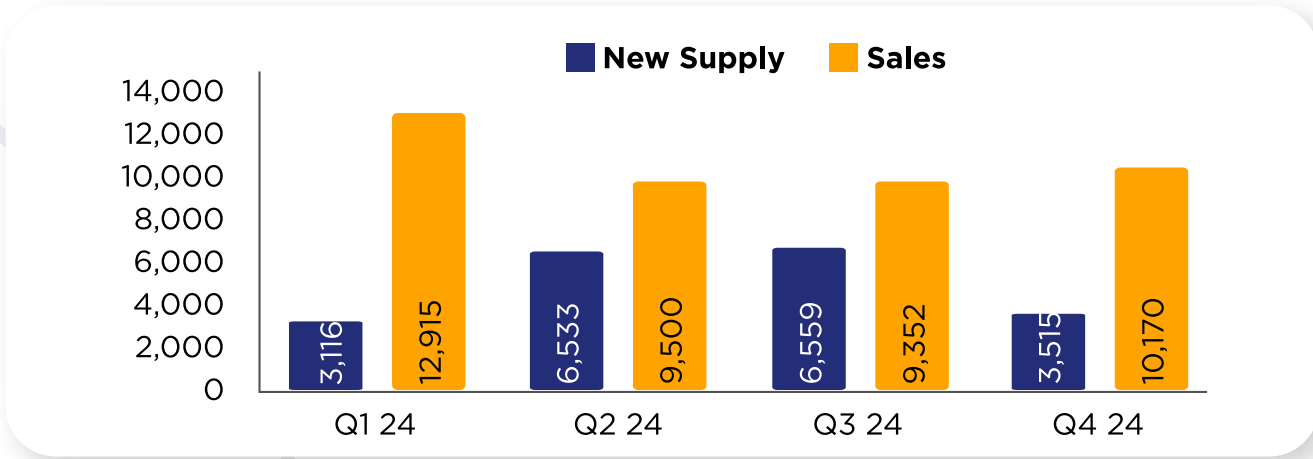
## City-wise price growth in 2024

City	Average price in INR/sqft	YoY change
Ahmedabad	4,402	10%
Bengaluru	7,536	12%
Chennai	7,173	16%
Delhi-NCR	8,105	49%
Hyderabad	7,053	3%
Kolkata	5,633	10%
MMR	12,600	18%
Pune	7,108	16%

# AHMEDABAD

New Supply		
2023	-65%	2024
55,877		19,723
Sales		
2023	1%	2024
41,327		41,937
Avg. Pricing		
2023	10%	2024
4,000		4,402

(Units in numbers, change in %, pricing in INR/sqft)

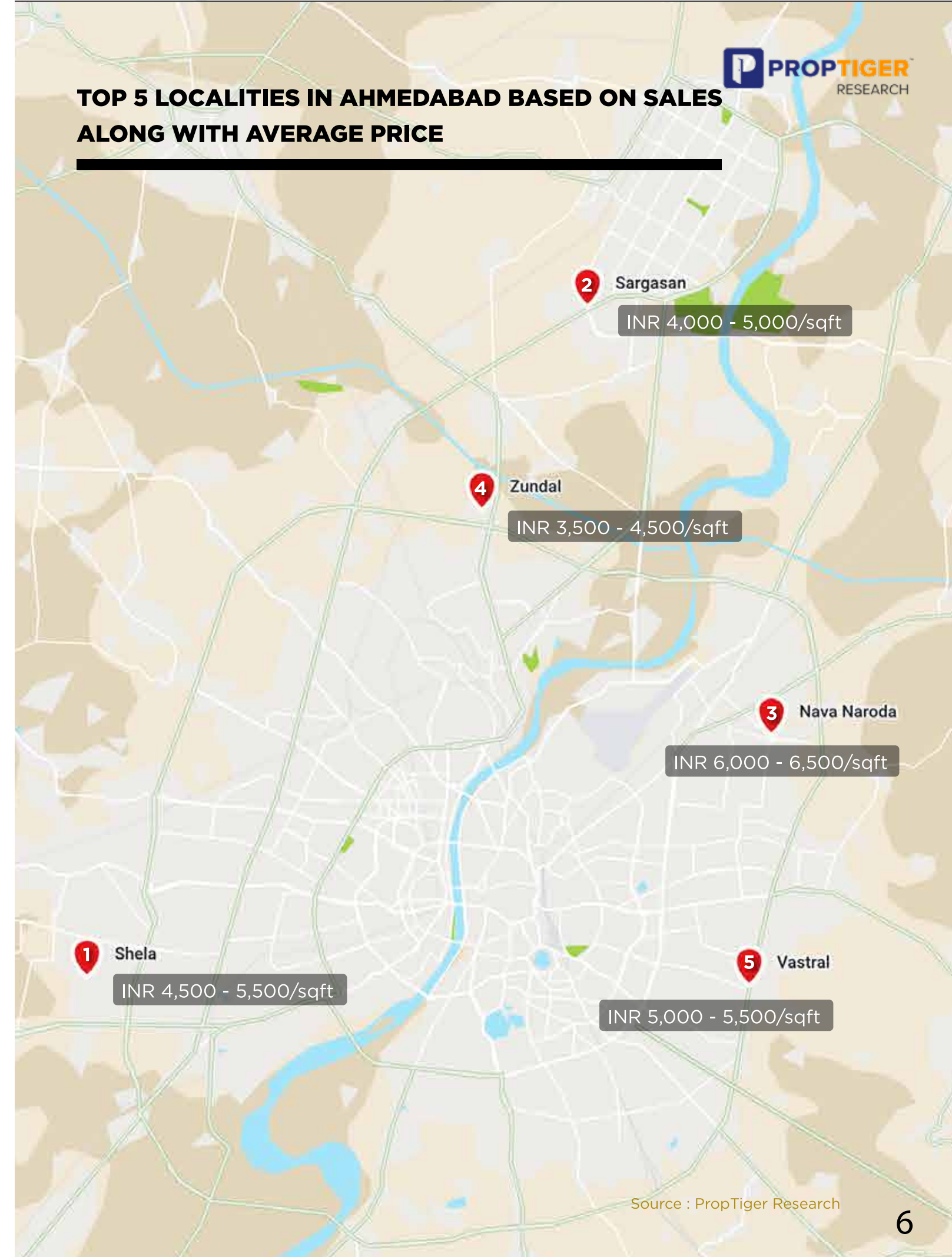


### Key Updates

- Real estate major Godrej Properties plans to build INR 1,300-crore housing project in Ahmedabad's Vastrapur.
- Gujarat in November proposed a hike in Jantri rates, a move that might jack up property rates by 20% in cities like Ahmedabad.
- With eyes on winning the bid to host 2036 Olympics, the government to infuse INR 6,000 crore to develop spots infrastructure in Ahmedabad.

**Demand for housing in Ahmedabad remains robust, primarily because real estate here remains comparatively affordable despite a price appreciation.**

## TOP 5 LOCALITIES IN AHMEDABAD BASED ON SALES ALONG WITH AVERAGE PRICE

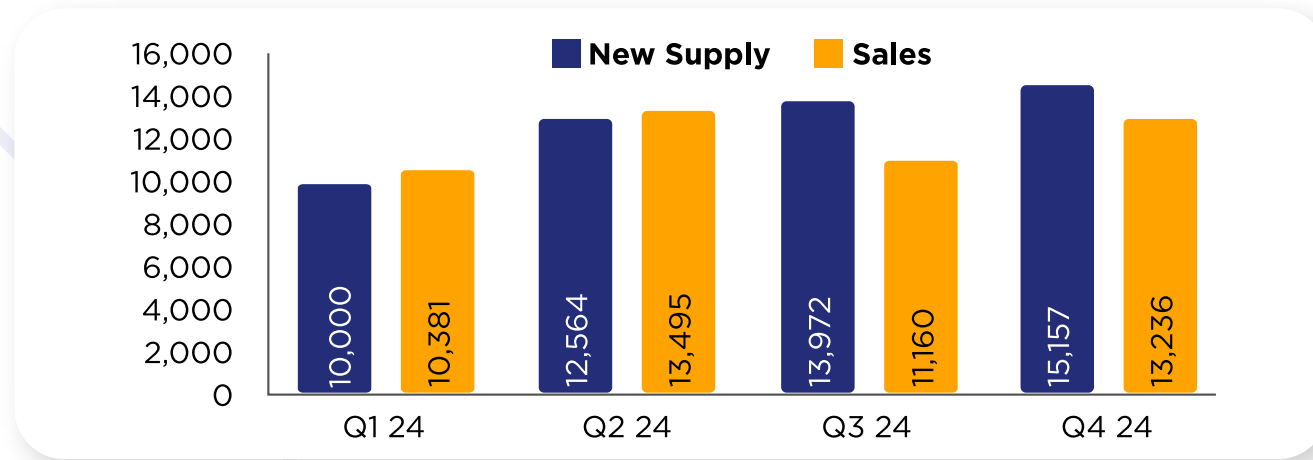




# BENGALURU

New Supply		
2023	8%	2024
47,965		51,693
Sales		
2023	10%	2024
44,002		48,272
Avg. Pricing		
2023	12%	2024
6,744		7,536

(Units in numbers, change in %, pricing in INR/sqft)



- ### Key Updates
- Macrotech to develop INR 2,800 crore project in Bengaluru.
  - Plans set afoot to develop the second airport in India's IT capital; state govt shortlists 3 sites.
  - Karnataka govt to pump in INR 1,31,500 crore to transform Bengaluru infrastructure.

The sustained demand for real estate in Bengaluru has been accompanied by a 12% YoY increase in average property prices.

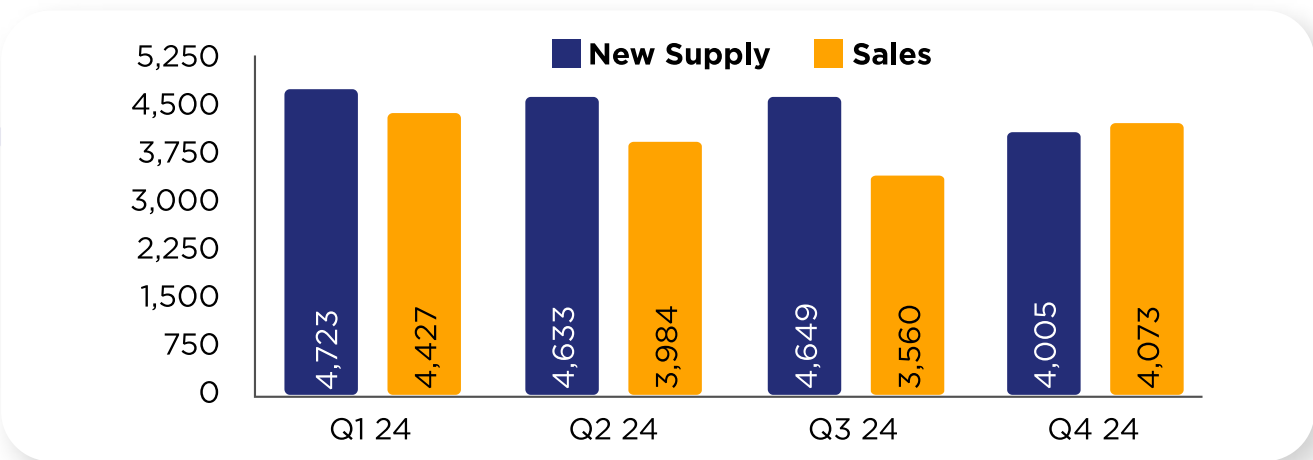
## TOP 5 LOCALITIES IN BENGALURU BASED ON SALES ALONG WITH AVERAGE PRICE



# CHENNAI

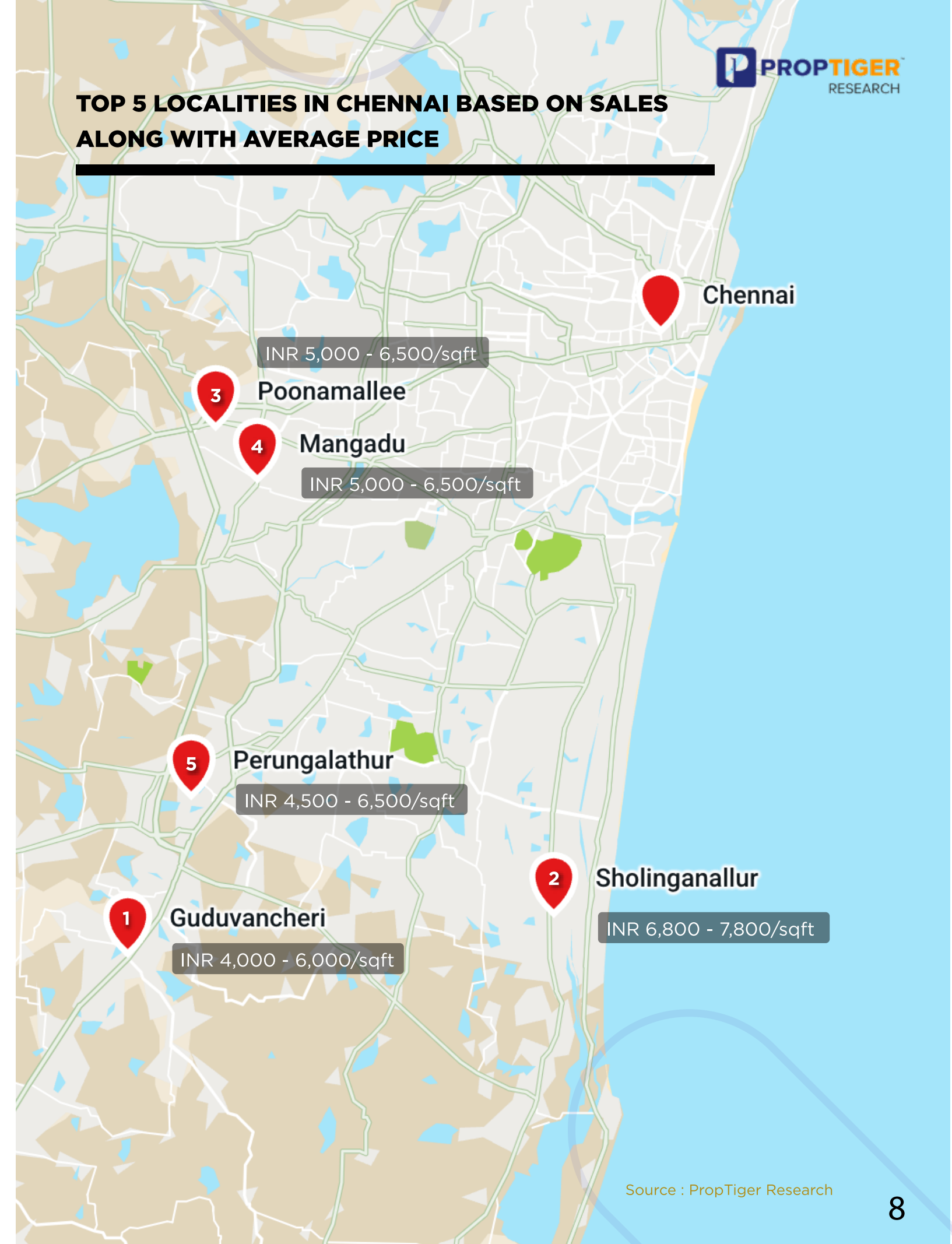
New Supply		
2023	16,153	2024
	11%	18,010
Sales		
2023	14,836	2024
	8%	16,044
Avg. Pricing		
2023	6,200	2024
	16%	7,173

(Units in numbers, change in %, pricing in INR/sqft)



- ### Key Updates
- TVS Emerald acquires 12 acres to develop a real estate project worth INR 2,800 crore on Radial Road in Chennai.
  - Tamil Nadu government standardises fee for self-certification of residential buildings (built-up area of up to 3,500 sq ft on plots not exceeding 2,500 sq ft.)
  - State revives eight-lane project at Perungalathur to ease traffic on the Grand Southern Trunk Road.

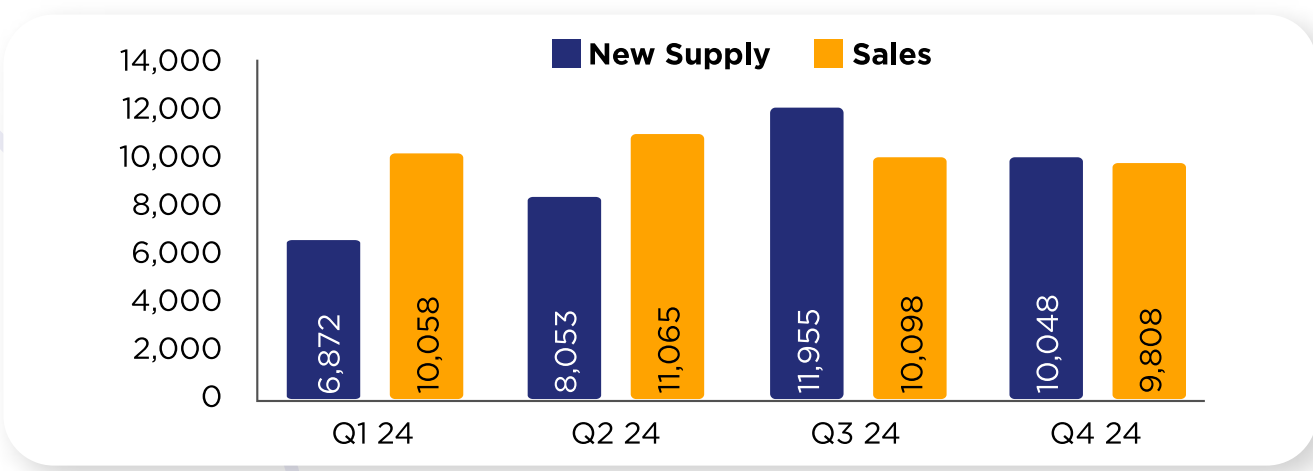
Average property prices in Chennai have been firming up in the past 5 years, so much so that real estate here is more expensive than that in Hyderabad.



# DELHI-NCR

New Supply		
2023	80%	2024
20,572		36,928
Sales		
2023	92%	2024
21,364		41,029
Avg. Pricing		
2023	49%	2024
5,445		8,105

(Units in numbers, change in %, pricing in INR/sqft)

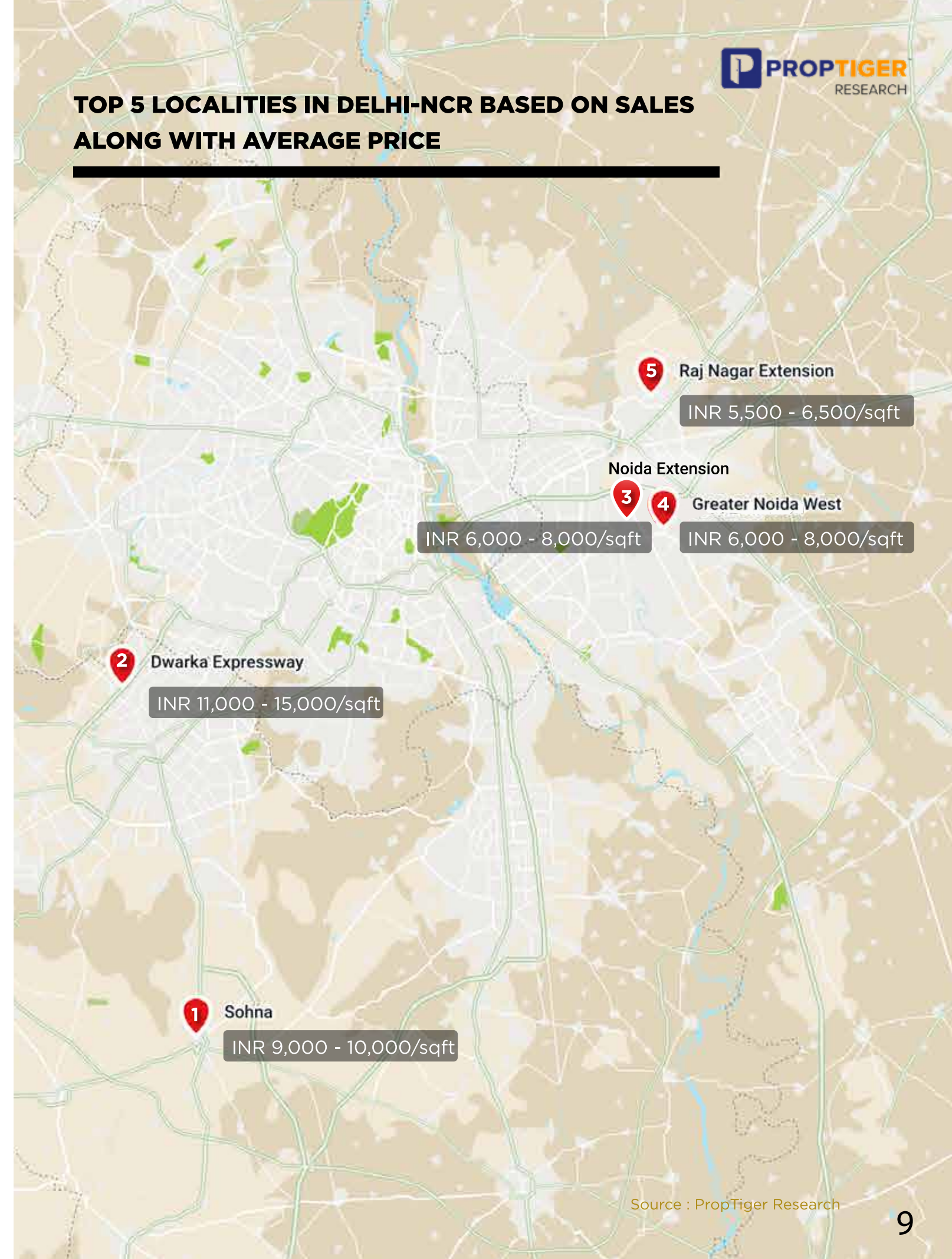


### Key Updates

- DLF to launch uber luxury real estate project in Gurugram, with the starting price expected to be around INR 80 crore.
- Circle rates hiked by up to 30% in Haryana; property registration prices go up in Gurugram, Faridabad.
- Centre approves a budget of more than INR 1,313 crore to strengthen the power infrastructure in Noida.

Average property prices saw a YoY rise of 49%, driven by growing demand for ultra-luxury properties, showcasing a clear preference for high-end homes in the region.

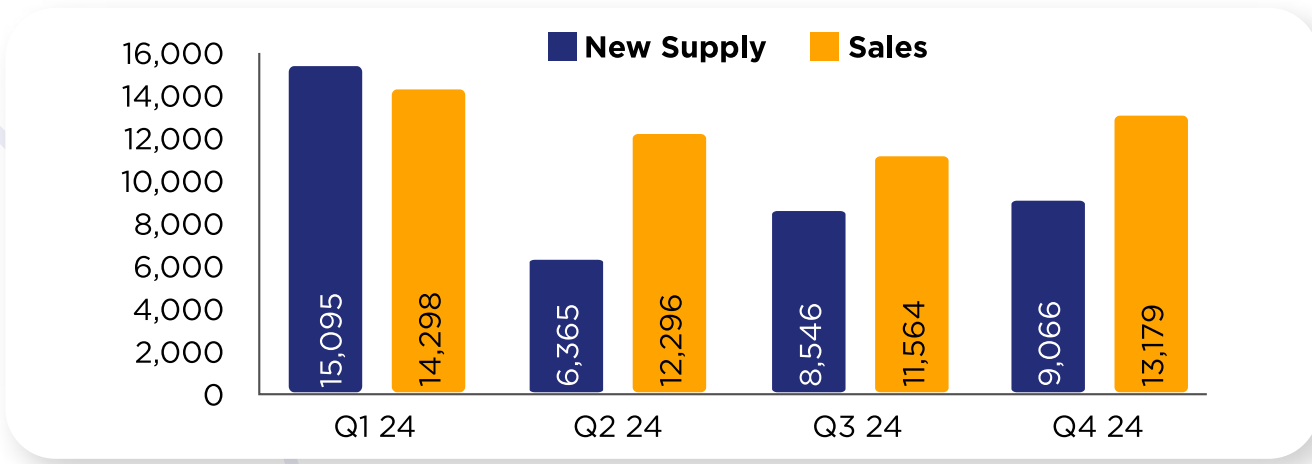
## TOP 5 LOCALITIES IN DELHI-NCR BASED ON SALES ALONG WITH AVERAGE PRICE



# HYDERABAD

New Supply		
2023	-49%	2024
76,819		39,072
Sales		
2023	-2%	2024
52,571		51,337
Avg. Pricing		
2023	3%	2024
6,842		7,053

(Units in numbers, change in %, pricing in INR/sqft)

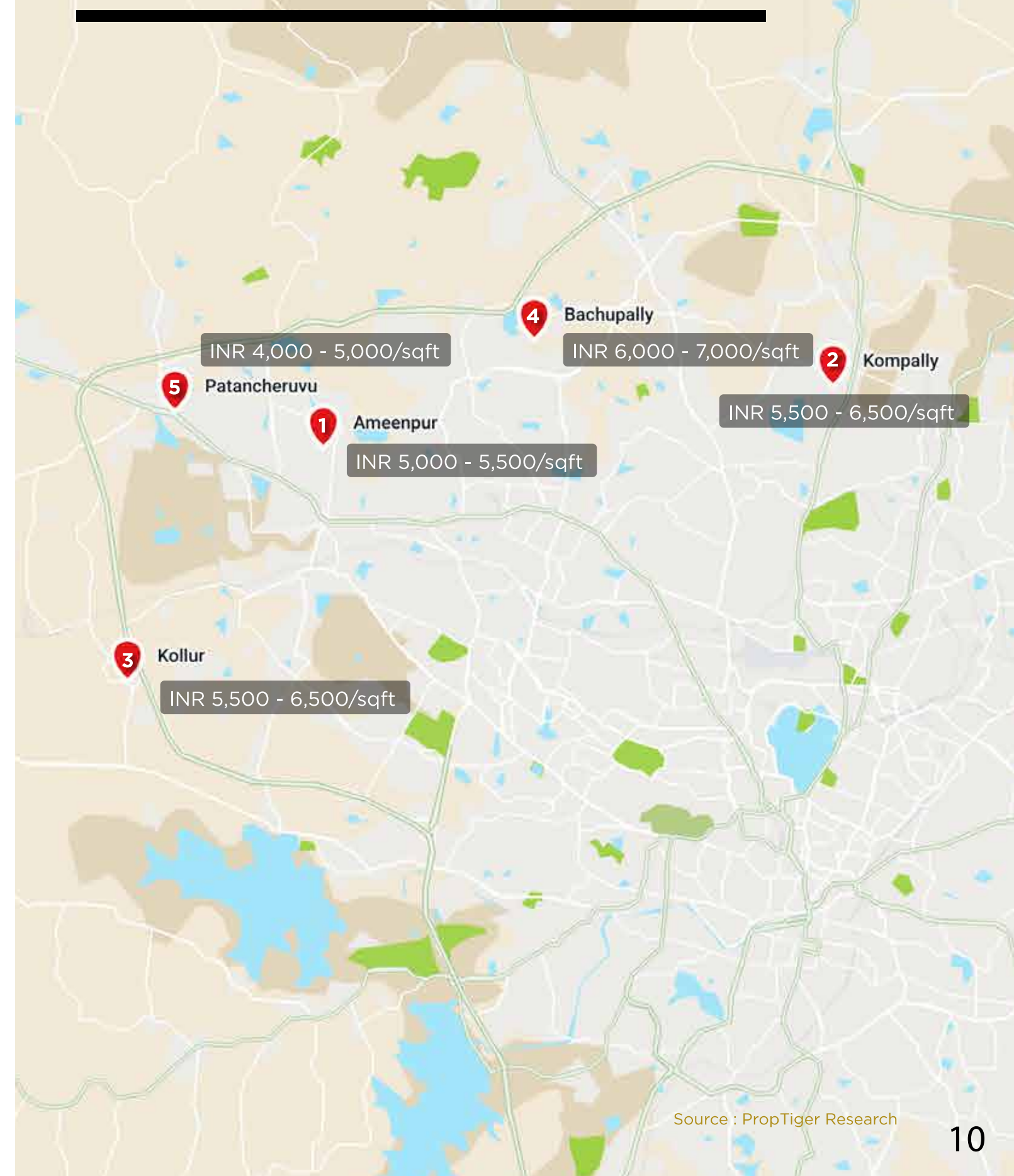


### Key Updates

- Godrej properties steps into Hyderabad with it's first residential project in Kokapet.
- Telangana government sanctions INR 24,269 crore for Hyderabad metro phase-II, comprising of 5 corridors covering almost 76.4Km.
- GMR Hyderabad International Airport will be investing INR 6,300 crore to increase the airport's capacity to 34 million passengers per annum.

Average property prices continued to rise, with a 3% growth on annual basis, reflecting steady buyer interest amidst fluctuating market dynamics.

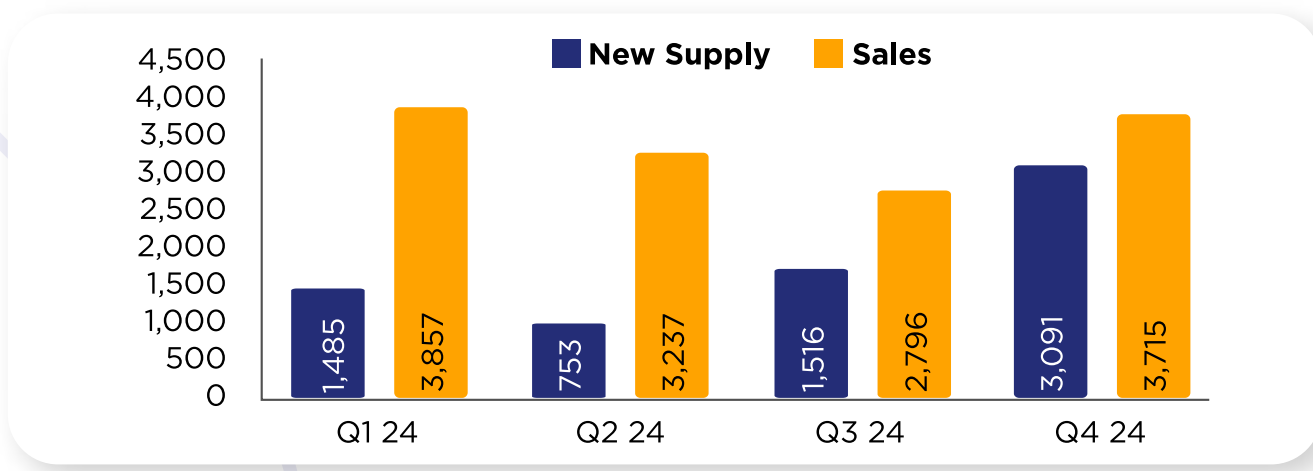
### TOP 5 LOCALITIES IN HYDERABAD BASED ON SALES ALONG WITH AVERAGE PRICE



# KOLKATA

New Supply		
2023	-55%	2024
15,303		6,845
Sales		
2023	9%	2024
12,515		13,605
Avg. Pricing		
2023	10%	2024
5,100		5,633

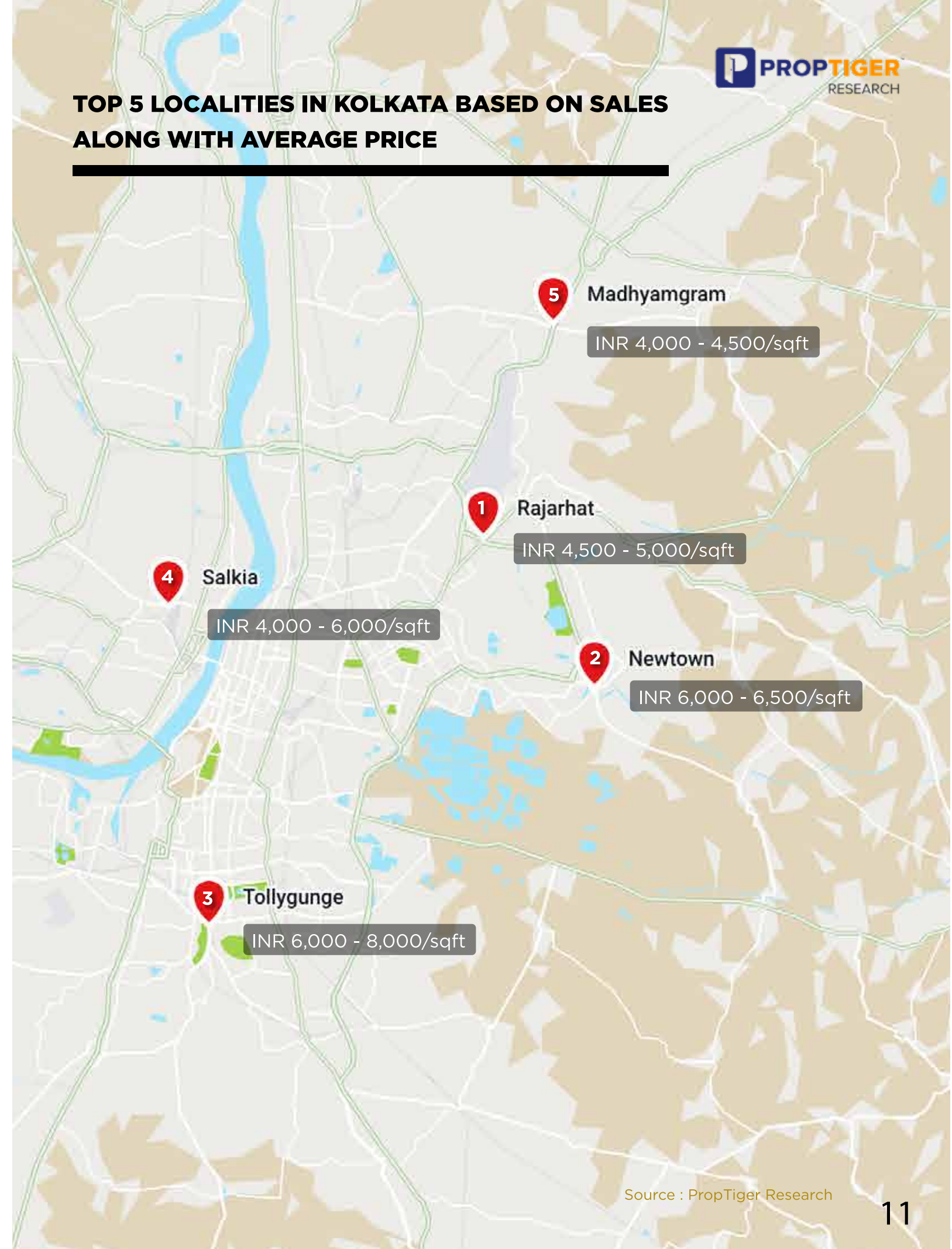
(Units in numbers, change in %, pricing in INR/sqft)



- ### Key Updates
- KMC mandates completion certificate for promoters before handing over the possession to buyers.
  - West Bengal govt awards INR 56-crore contract for land record modernisation.
  - Kolkata metro plans to extend Joka-Esplanade purple line to Eden Gardens.

After bottoming out in the second quarter, new supply in the City of Joy has shown significant increase in the last quarter of 2024.

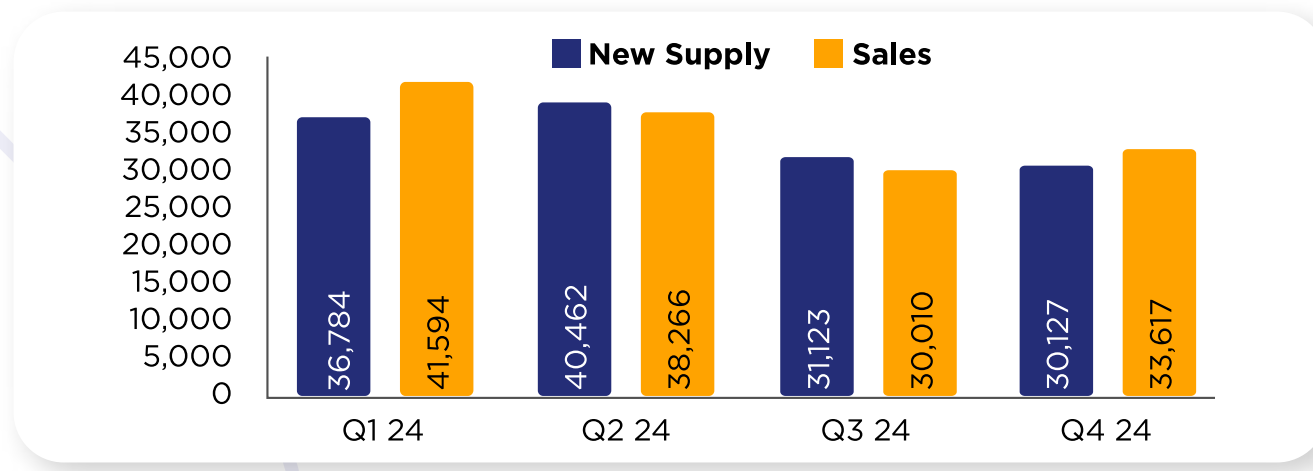
## TOP 5 LOCALITIES IN KOLKATA BASED ON SALES ALONG WITH AVERAGE PRICE



# MMR

<b>New Supply</b>		
<b>2023</b>	<b>-22%</b>	<b>2024</b>
178,684		138,496
<b>Sales</b>		
<b>2023</b>	<b>1%</b>	<b>2024</b>
141,480		143,487
<b>Avg. Pricing</b>		
<b>2023</b>	<b>18%</b>	<b>2024</b>
10,712		12,600

(Units in numbers, change in %, pricing in INR/sqft)

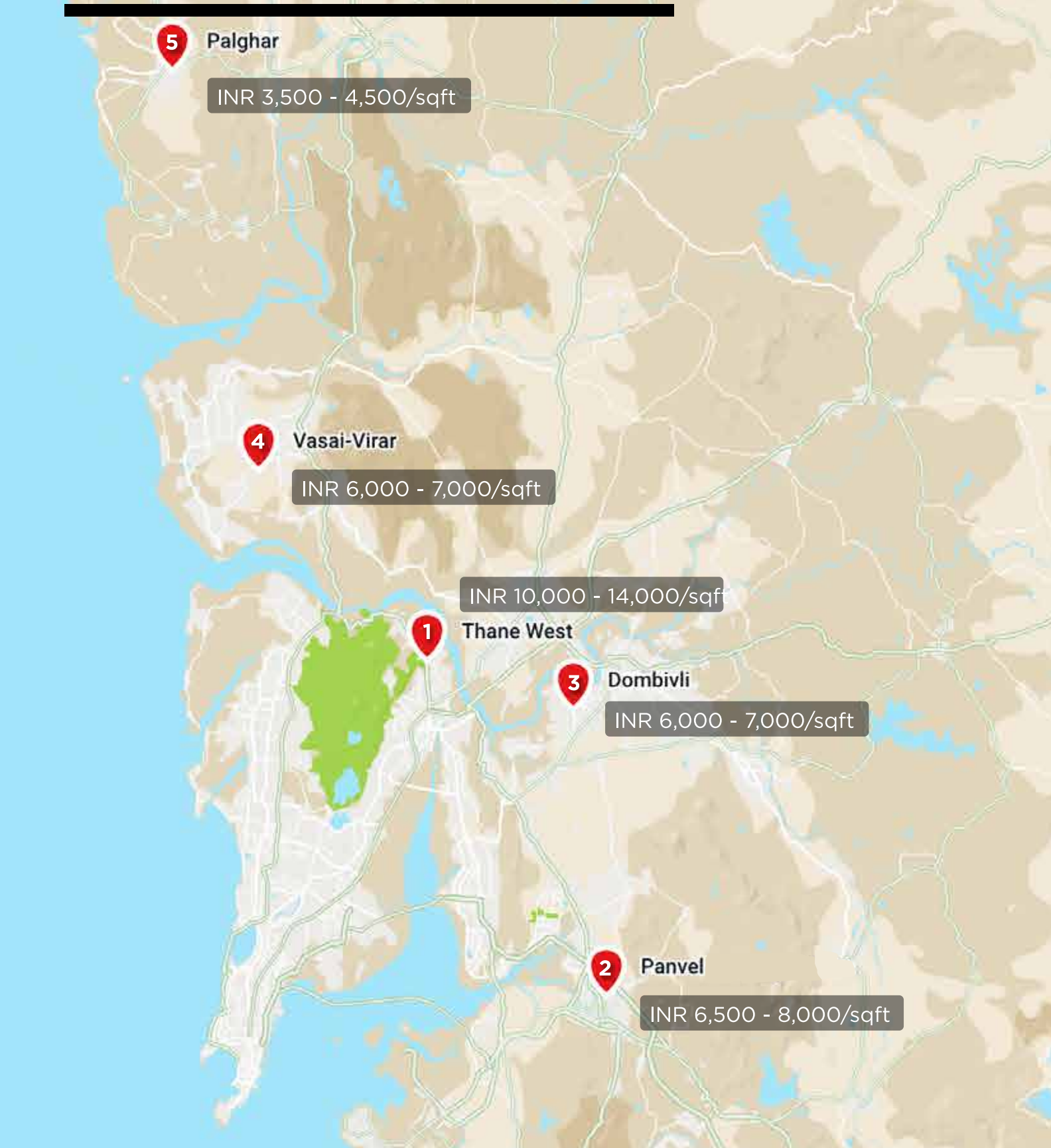


### Key Updates

- Union Minister Nitin Gadkari gives in-principle nod for cable car project in Mumbai, aimed at addressing growing urbanisation and transport challenges in the MMR.
- PM Narendra Modi inaugurated BKC-Aarey JVLR Section of Mumbai Metro Line-3, costing around INR 14,120 crore.
- Emaar India looking at investing around INR 2,000 crore in the Mumbai market.

State polls have had a bearing on sales as well as supply in the last quarter of 2024 even as property values showed an upwards movement in India's most expensive housing market.

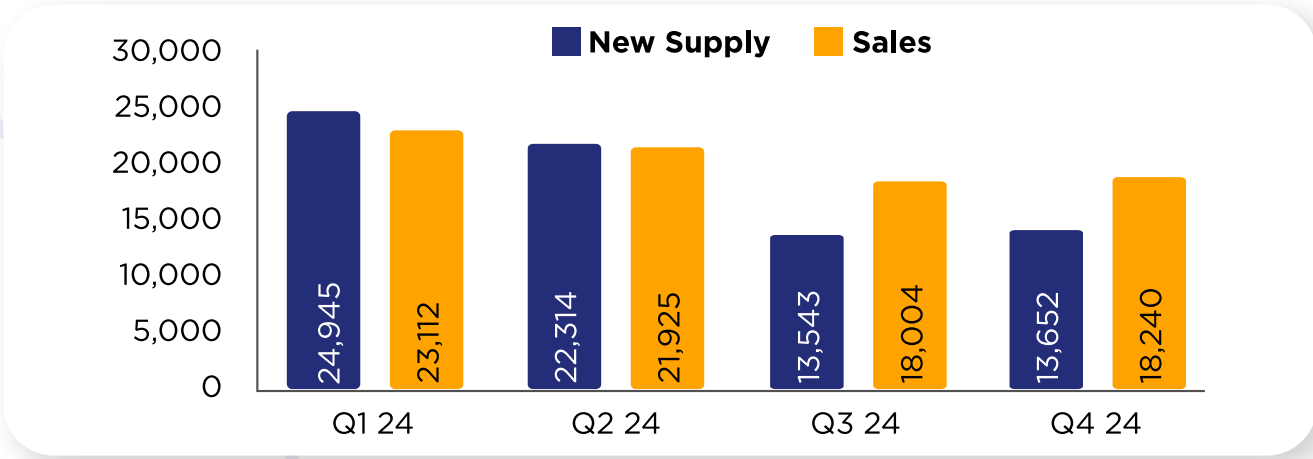
## TOP 5 LOCALITIES IN MMR BASED ON SALES ALONG WITH AVERAGE PRICE



# PUNE

New Supply		
2023	-30%	2024
105,698		74,454
Sales		
2023	-2%	2024
82,696		81,281
Avg. Pricing		
2023	16%	2024
6,140		7,108

(Units in numbers, change in %, pricing in INR/sqft)

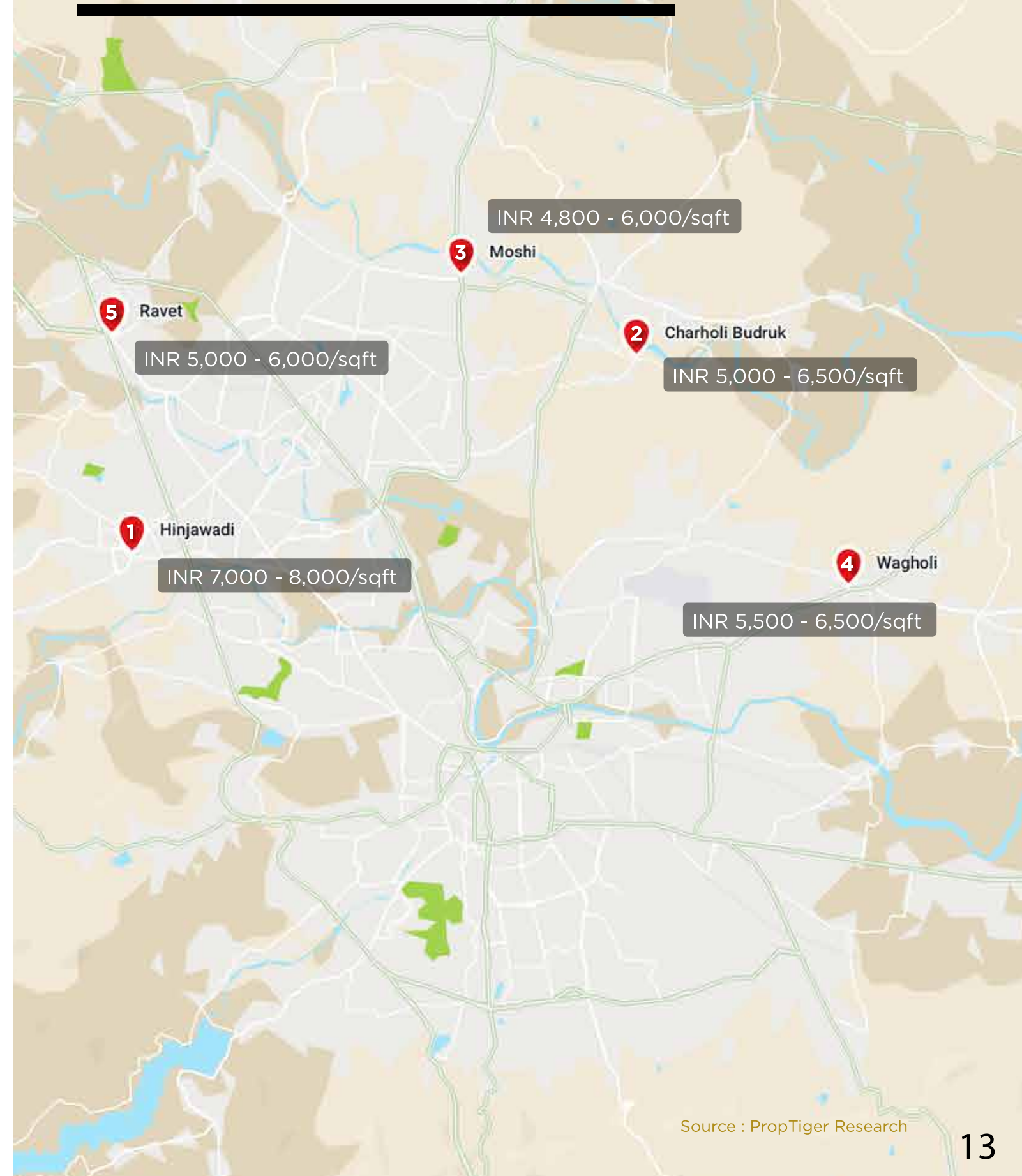


### Key Updates

- Licensed partner for Trump Organisation in India, Tribeca Developers, to launch repeat project in Pune.
- Bidding for all four phases of the Pune Outer Ring road complete.
- Swargate-Katraj Metro extension work, comprising of 5.46 km of twin tunnels and four underground stations, to begin soon.

**Demand for residential real estate remains robust in Pune as indicated by a comparatively lower inventory overhang (22 months).**

### TOP 5 LOCALITIES IN PUNE BASED ON SALES ALONG WITH AVERAGE PRICE



# OUTLOOK

The Union Budget 2025-26 has introduced several policy measures aimed at accelerating infrastructure development while simultaneously enhancing disposable income for taxpayers. Key initiatives include the INR 1 lakh crore Urban Challenge Fund, the introduction of SWAMIH Fund 2.0, an increase in TDS threshold on rental income and a tax rebate on income up to INR 12 lakh. These strategic measures are expected to have a positive impact on the residential real estate sector, with their effects becoming increasingly evident in the coming quarters.

India's retail inflation cooled to a four-month low of 5.22% in December even as the International Monetary Fund predicted a 'little weaker growth' for the world's fifth largest economy because of global uncertainties, caused primarily by US trade policies.

In a significant policy shift, the Reserve Bank of India reduced the repo rate by 25 basis points in its latest meeting on February 7, the first such cut in five years. This move, combined with a growth-oriented Union Budget, is expected to lower borrowing costs for both developers and buyers, stimulate investment and improve overall housing affordability. As the economy moves into a more accommodative monetary phase, the real estate sector is poised to benefit from increased consumer confidence and enhanced credit accessibility.





## Annexure - I

### Glossary

#### New supply

It includes the new units launched in a new project or an already launched project during the quarter or the mentioned duration.

#### Sales

It includes the units sold in all the available projects (including newly launched projects) during the quarter or the mentioned duration.

#### Inventory overhang

It represents the number of months required to offload the existing stock in the market.

#### Sales velocity

It is calculated as the ratio of monthly sales to the total supply.

#### Price

It is the weighted average price of the total supply.

**Note:** Analysis in the report includes apartments and villas only. RERA registration date is considered as day zero for recording new supply and sales.

## Annexure - II

### Geographical Spread of Report

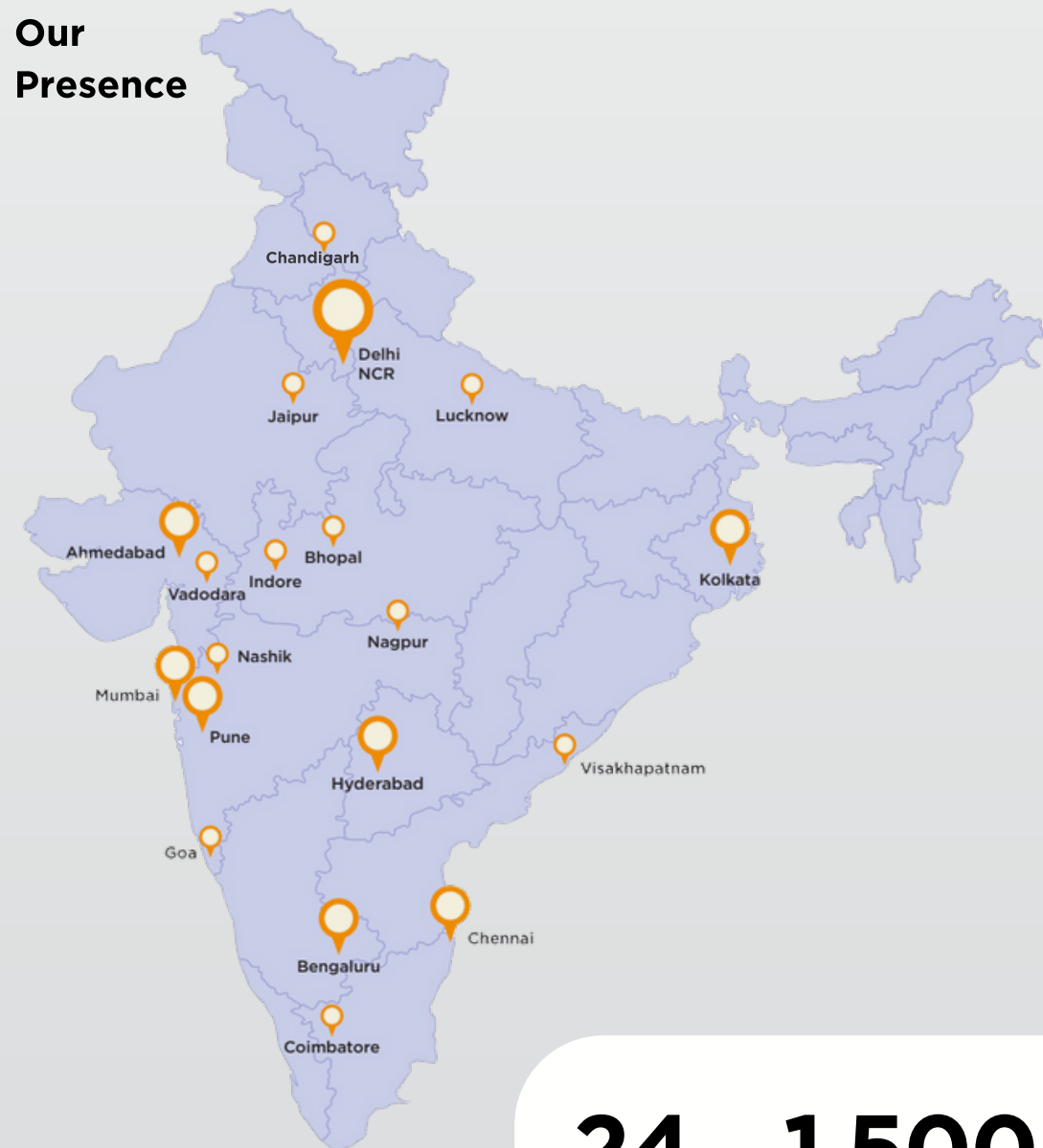
CITY	MICRO MARKET	PROMINENT LOCALITIES
<b>Ahmedabad</b>	Ahmedabad Central	Ellisbridge, Paldi, Saraspur, Vasna
	Ahmedabad East	BapuNagar, Nava Naroda, New Maninagar, Nikol, Odhav, Vastral
	Ahmedabad North	Chandkheda, Gota, Motera, Nana Chiloda, Ranip, Vadsar
	Ahmedabad South	Vatva, Narol, Narolgam, Isanpur, Changodar
	Ahmedabad West	Bopal, Ghuma, Shela, Sarkhej, Shilaj, Sanand, Vastrapura
	SG Highway	Near Nirma University on SG Highway, Near Vaishno Devi circle on SG Highway, Thaltej, Chanakyapuri
	Gandhinagar	Urjanagar, Sargaasan, Gift City, Zundal, Rayson
	<b>Bengaluru</b>	Central Bengaluru
East Bengaluru		Whitefield Hope Farm Junction, CV Raman Nagar, KR Puram, Mahadevapura, Harlur, Sarjapur, ITPL, Varthur, BudigereCross
North Bengaluru		Yelahanka, Doddaballapur, Hebbal, Thanisandra, Jakkur, Kodigehalli, Kannur
North East Bengaluru		Horamavu, Devanahalli, Narayanapura, Hennur, Banaswadi, Kalyan Nagar
North West Bengaluru		Jalahalli, Yeshwantpur, Nelamangala Town, Rajaji Nagar, Near Peenya Industrial Area
South Bengaluru		Begur, JP Nagar, Bommanahalli, Gottigere, Hosa Road, Padmanabha Nagar, Hulimavu
South East Bengaluru		Electronics City, Hosur, Anekal City, Jigani, Chandapura, Attibele, Bommasandra, Narayanaghatta, Avalahalli
West Bengaluru		Kumbalgodu, Kengeri, Nagarbhavi
<b>Chennai</b>	Chennai Central	Anna Nagar, Alwarpet, Guindy, Raja Annamalai Puram, Vadapalani
	Chennai North	Perembur, Madhavaram, Kolathur, Ponneri
	Chennai South	Perrumbakkam, Mambakkam, Thiruporur
	Chennai West	Avadi, Koyembedu, Manapakkam, Mangadu, Mogappair, Vanagram, Thirumazhisai, Mevalurkuppam, Ambattur
	ECR	Injambakkam, Thiruvanimiyur, Kanathur Reddikuppam
	GST	Guduvancheri, Perungalathur, Singaperumal Koil, Orgadam, Maraimalai Nagar, Tambaram, Chromepet
	OMR	Padur, Perungudi, Sholinganallur, Siruseri, Thalambur, Medavakkam, Kelambakkam, Tiruporur Near Kelambakkam
	Vandalur	Kelambakkam Road Moolacheri, Nallambakkam
<b>Delhi - NCR</b>	Faridabad	Ballabgarh, Greater Faridabad, Hodal, NH2, Surajkund
	Ghaziabad	Ghaziabad Central, Indirapuram, Kaushambi, NH 24, NH57, NH58, Sahibabad, Vaishali, Vasundhara, Bhopura
	Greater Noida	Noida Extension, Yamuna Expressway (Chi 5, TechZone), Bodaki, Eta, Beta, Knowledge Park, Omnicron, Pi, Surajpur, Swarn Nagari, Zeta
	Gurugram	Dwarka Expressway (Sector 35-37, 84, 88, 89, 99, 102-113), Golf Course Extension Road (Gwal pahari, sector 59 - 63, 65), Gold Course Road (Sector 28, 42, 54), Gurgaon Central, Manesar, New Gurgaon (Sector 76-82, 85-93, 95), Old Gurgaon, Sohna & Sohna Road (Sector 48, 67, 68), Southern Peripheral Road (Sector 69 - 72)

CITY	MICRO MARKET	PROMINENT LOCALITIES
<b>Hyderabad</b>	Hyderabad West	Hitec City, Gachibowli, Manikonda, Narsingi, Serilingampally, Nallagandla Gachibowli, Kondapur, Chandanagar, Hafeezpet, Bachupally, Miyapur
	Hyderabad North	Kompally, Tellapur, Kukatpally, Nizampet, Bolarum, Bahadurpally, Shamirpet
	Hyderabad South	Saidabad, Kismatpur, Maheshwaram, Shadnagar, Rajendra Nagar
	Hyderabad East	LB Nagar, Nagole, Hayathnagar, Vanasthalipuram, Uppal Kalan, Saroor Nagar
	ORR South	Bongloor, Shamshabad, Adibatla, Pocharam
	Secunderabad	Mallapur, Yapral, Sainikpuri, Alwal, AS Rao Nagar
	Hyderabad Central	Somajiguda, Ameerpet, Himayat nagar, Jubilee Hills, Begumpet, Banjara Hills
<b>Kolkata</b>	Kolkata East	New Town, Rajarhat, Salt Lake City, Tangra, Beliaghata
	Kolkata North	Dum Dum, Madhyamgram, Barasat, Barrackpore, Lake Town, Rishra
	Kolkata South	Baruipur, Behala, Joka, Garia, Narendrapur, Sonarpur, Uttar Gauripur, Tollygunge, New Alipore, Mukundapur
	Kolkata West	Serampore, Howrah, Uttarpara Kotrung, Konnagar
	Kolkata Central	Sealdah
<b>MMR</b>	Andheri to Dahisar	Andheri, Borivali, Dahisar, Goregaon, Jogeshwari, Kandivali, Malad
	Worli to Andheri	Bandra, Dharavi, Juhu, Khar, Mahim, Santacruz, Ville Parle
	Central Mumbai	Bandra Kurla Complex, Bhand up, Ghatkopar, Kanjurmarg, Kurla, Matunga, Mulund, Powai, Sion, Vikhroli
	Mumbai South	Colaba, Narimat Point, Dadar, Worli, Byculla, Mahalaxmi, Parel, Lower Parel, Girgaon, Prabhadevi
	Mumbai Harbour	Sewri, Wadala, Chembur, Mazegaon
	Mira Road and Beyond	Mira Road, Vasai, Virar, Nala Sopara, Bhayandar, Boisar, Naigaon East, Palghar
	Navi Mumbai	Airoli, Belapur, Kharghar, Taloja, Dronagiri, Ghansoli, Karanjade, Ulwe, Vashi, Warai
	Thane	Thane East & Thane West
	Beyond Thane	Ambarnath, Badlapur, Bhiwandi, Dombivali, Kalyan, Karjat, Neral, Vangani, Ambivali, Anjurdive, Ulhas Nagar, Shil Phata
	Panvel and Beyond	Panvel, Khopoli, Rasayani, Khalapur, Kewale, Umroli, Pen, Chowk
<b>Pune</b>	PCMC	Chikhali, Ravet, Wakad, Tathawade, Moshi, Mamurdi, Jambhul, Pimpri, Rahatani, Gahunje
		Chinchwad
	Pune South	Dhayari, Kondhwa, Undri, Ambegaon Budruk, Phursungi, NIBM Annex Mohammadwadi, Handewadi, Shirwal, Shivapur, Baramati, Nasrapur, Katraj, Bibwewadi
	Pune West	Hinjewadi, Pirangut, Bavdhan, Mahalunge, Baner, Mugawade, Balewadi, Bhukum, Kothrud, Kamshet, Bhugaon
	Pune North	Talegaon Dabhade, Alandi, Chakan, Dhanori, Rajgurunagar, Dehu
	Nagar Road	Wagholi, Kharadi, Lohegaon, Lonikand, Sanaswadi
	Pune Solapur Highway	Hadapsar, Manjari, Uruli Kanchan, Loni Kalbhor
	Mumbai Pune Bypass	Vadgaon Budruk, Sus, Warje, Shivane, Karve Nagar
Pune East	Mundhwa, Bakhori, Kedagaon, Daund	

## About PropTiger.com

PropTiger.com is among India's leading digital real estate transaction and advisory services platform, offering a one-stop platform for buying residential real estate. Founded in 2011 with the goal to help people buy their dream homes, PropTiger.com leverages the power of information and the organisation's deep-rooted understanding of the real estate sector to bring simplicity, transparency and trust in the home buying process. PropTiger.com helps homebuyers through the entire homebuying process through a mix of technology-enabled tools as well as on-ground support. The company offers researched information about various localities and properties and provides guidance on matters pertaining to legal paperwork and loan assistance to successfully fulfil a transaction.

## Our Presence



**24** Offices **1,500+** People strong

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