

City Snapshot

LAUNCHES	SALES	AVAILABLE INVENTORY	AVERAGE QUOTED BASE SELLING PRICE
17,700 Units	16,650 Units	80,200 Units	
-18% Quarterly Change	9% Quarterly Change	1% Quarterly Change	₹ 9,600 /sf



A Bird's Eye View

Bengaluru		RENTAL VALUES		CAPITAL VALUES		OUTLOOK
Key Micro-markets	Avg. Quoted Rent (₹/month)	Quarterly Change (%)	Avg. Quoted Rate (₹/sf)	Quarterly Change (%)	Short-term	
Electronic City	20,000-31,500	1%	7,570	2%		↑
Whitefield	30,000-47,000	1%	11,030	2%		↑
Sarjapur Road	33,000-48,000	2%	11,730	1%		↑
Thanisandra Main Road	28,000-43,000	1%	10,550	2%		↑
Mysore Road	20,000-26,000	0%	8,180	2%		↑

Zonal Classification

Central	Chamrajpet Frazer Town Richmond Road Ulsoor Shanti Nagar
North	Hebbal Yelahanka Jalahalli Thanisandra Main Road Hennur Road Doddaballapur Road International Airport Road
South	Begur Rd JP Nagar Electronic City Hosur Road Bannerghatta Road Kanakapura Road Koramangala
East	Whitefield KR Puram Sarjapur Road Harlur Road Marathahalli Varthur Road Bellandur Old Madras Road
West	Tumkur Road Magadi Road Mysore Road Rajaji Nagar Naagarabhaavi Vijay Nagar Nelamanagala

↑	INCREASE
▢	STABLE
↓	DECREASE

Note: Rounding may result in minor variations between the stated and calculated values.

Average Quoted Rent for 2 BHK apartment measuring 1,000 sf; Average Quoted Rate (Base Price) on Super Built-up Area (SBUA)

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Key Project Launches

Prestige Parklane

Prestige Group
Devanahalli
1,788 units
₹ 11,400/sqft

Bhartiya Garden Hill Phase I & II

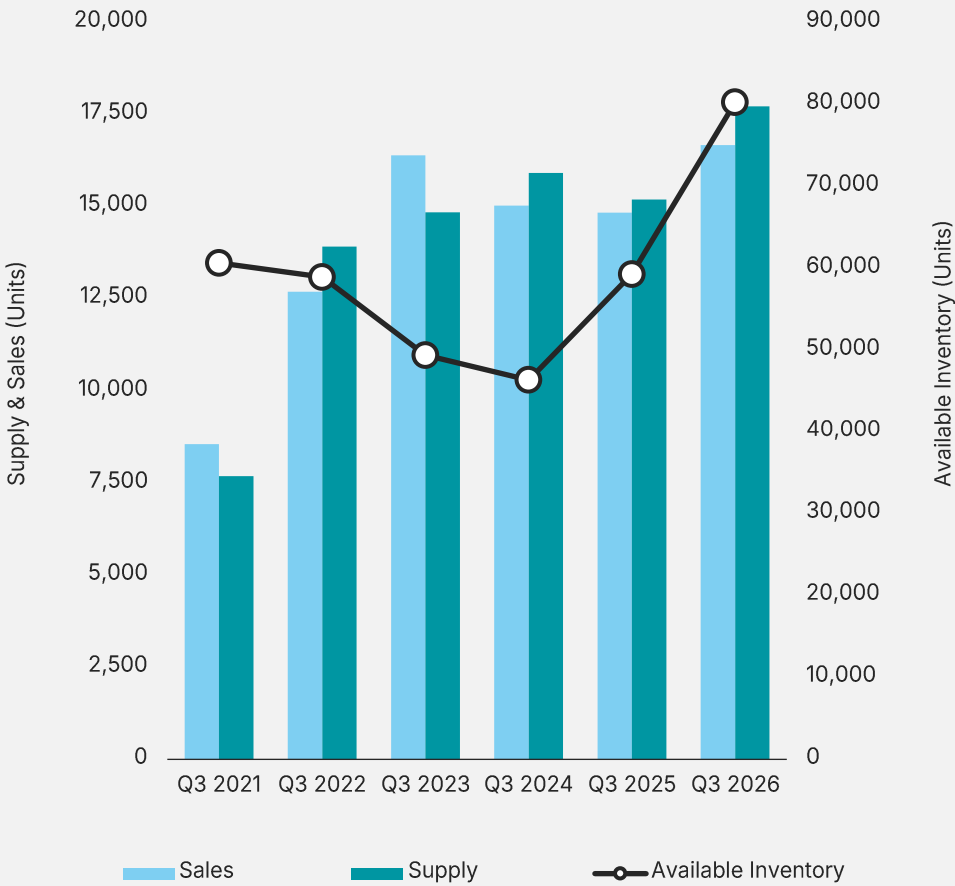
Bhartiya Group
Bagaluru
1,554 units
₹ 11,500/sqft

Embassy South Reserve

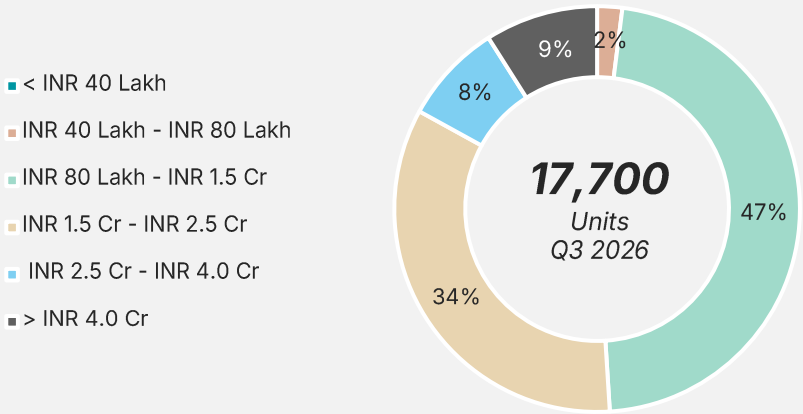
Embassy Group
Tharahunise
855 units
₹ 13,500/sqft

Above average basic selling prices are quoted on Saleable Area

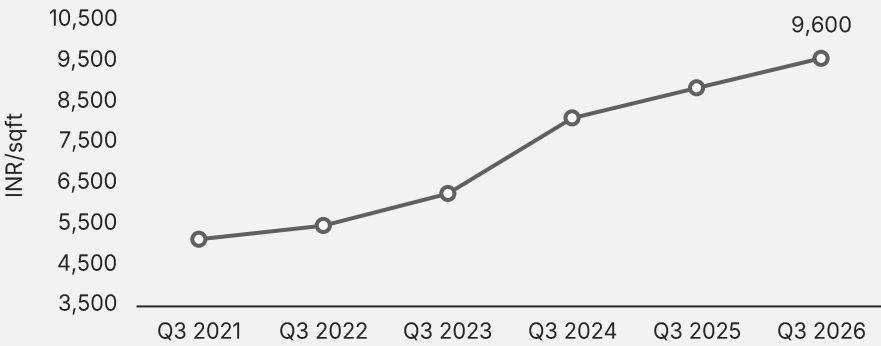
DEMAND SUPPLY DYNAMICS



SUPPLY BUDGET-SEGMENTATION



PRICE TREND



Average Quoted Rent for 2 BHK apartment measuring 700 sf; Average Quoted Rate (Base Price) on Super Built-up Area (SBUA)
Available inventory includes units from projects that are launched but yet not sold, despite the launch timelines and construction progress
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Residential Market Viewpoints **Bengaluru Q3 2026**

Launches

North Bengaluru led residential launch activity in Bengaluru in Q3 2026

Bengaluru contributed approximately 15% of total residential launches across the top seven cities in India, with around 17,700 units launched during the quarter. Residential launches declined by 18% quarter-on-quarter but increased by 16% year-on-year.

Launch activity in Bengaluru was largely driven by North Bengaluru, which contributed 46% of total new supply and recorded growth of 60% quarter-on-quarter and 121% year-on-year, indicating strong momentum in the zone. East Bengaluru followed with a 40% share of total launches, although launch activity declined by 24% quarter-on-quarter and 13% year-on-year. South Bengaluru recorded a decline in launches on both a quarter-on-quarter and year-on-year basis. West Bengaluru contributed the smallest share of new supply, with residential launches declining significantly on both a quarter-on-quarter and year-on-year basis.

In terms of budget segmentation, residential launches in Bengaluru were primarily concentrated in the Upper Mid-Segment, which contributed 47% of total launches, followed by the High-End Segment at 35% and the Ultra-Luxury Segment at 9%.

Sales Trend

East Bengaluru continued to lead residential sales in Bengaluru, maintaining its dominant position in overall absorption

Bengaluru contributed approximately 17% of total residential sales across the top seven cities in India, with around 16,650 units sold during the quarter. Residential sales increased by 9% quarter-on-quarter and 12% year-on-year, indicating sustained growth in the residential market.

East Bengaluru continued to lead residential sales, contributing 44% of overall absorption. Sales in the zone increased by 9% quarter-on-quarter and 11% year-on-year. North Bengaluru followed with a 34% share of total sales, with absorption increasing by 23% quarter-on-quarter and 27% year-on-year.

South Bengaluru continued to contribute a significant share of overall sales despite a quarter-on-quarter decline in absorption, while sales remained broadly stable year-on-year. West Bengaluru contributed a smaller share of overall sales, with absorption declining on both a quarter-on-quarter and year-on-year basis.

Available Inventory

Available residential inventory in Bengaluru continues to rise, while quarterly additions remain moderate

Bengaluru contributed approximately 13% of the total available residential inventory across the top seven cities in India, with around 80,200 units in stock. Inventory levels remained broadly stable quarter-on-quarter, rising by 1%, while registering a 35% increase year-on-year.

Available residential inventory in Bengaluru remained concentrated in East Bengaluru, which contributed 48% of total stock. North Bengaluru followed with a 30% share, with the two zones together comprising 78% of the available inventory. South Bengaluru continued to hold a notable share of available residential inventory, with stock declining quarter-on-quarter but increasing year-on-year. West Bengaluru contributed the smallest share of available inventory, with stock declining quarter-on-quarter while recording a marginal increase year-on-year.

Inventory overhang remained stable at 15 months in Q3 2026, unchanged from Q2 2026. This indicates relative stability in the available inventory levels during the quarter.



Outlook

The residential market in Bengaluru is expected to maintain positive momentum, supported by resilient demand and continued expansion of the IT and GCC ecosystem. Government-led initiatives, including the proposed 17-km North-South Tunnel Road, the 7,400-acre Greater Bengaluru Integrated Township at Bidadi, and the proposed 37.8-km Namma Metro Phase 3A (Red Line) connecting Sarjapur to Hebbal, could enhance connectivity, support decentralised urban growth and strengthen residential demand across emerging and established corridors. With inventory overhang stable at 15 months, sustained employment growth, timely infrastructure delivery and disciplined supply additions will remain key to market resilience.

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Budget Segmentation:

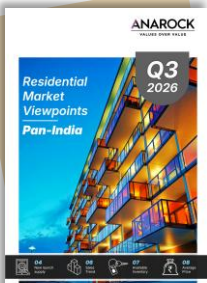
Affordable: < INR 40 Lakh
Lower Mid: INR 40 Lakh - INR 80 Lakh
Upper Mid: INR 80 Lakh - INR 1.5 Cr
High-end: INR 1.5 Cr - INR 2.5 Cr
Luxury: INR 2.5 Cr - INR 4 Cr
Ultra-Luxury: > INR 4 Cr

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