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Residential Real Estate Report

TELLAPUR – KOLLUR – OSMAN NAGAR

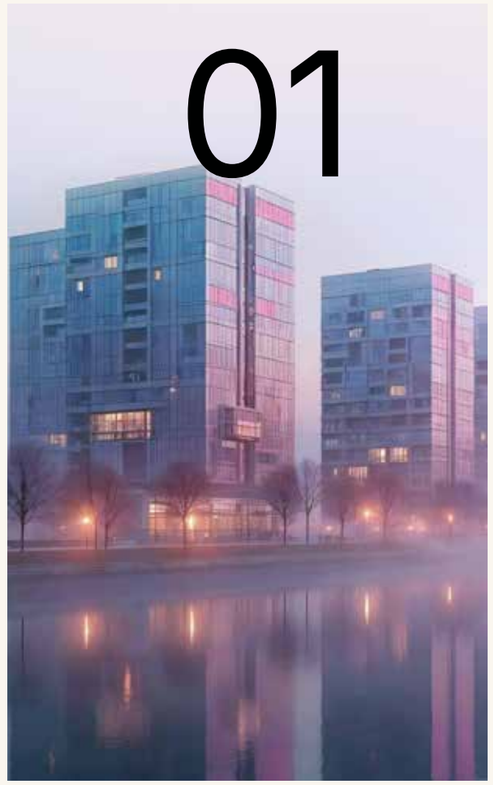
West Hyderabad's Fastest-Rising Residential Corridor



AUGUST 2026

CONTENT

Snapshot
Tellapur – Kollur- Osman Nagar



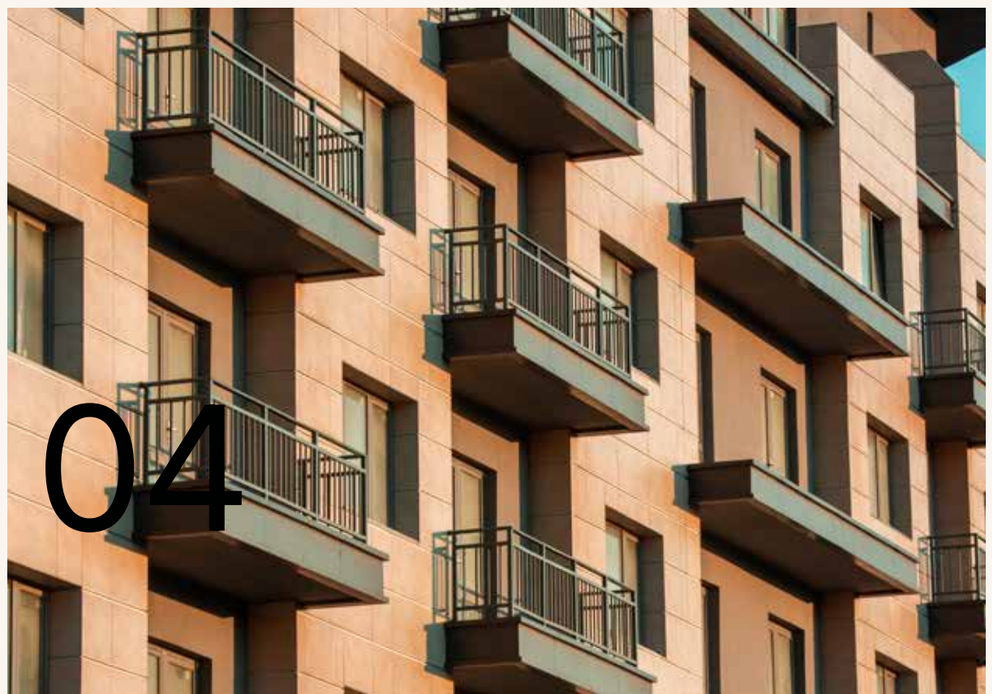
The Physical Infrastructure





The Social Backbone

Employment Proximity & IT Corridor Analysis







A Way Forward

Strategic Snapshot



Real Estate Statistics

Real Estate Snapshot



Snapshot Tellapur – Kollur-Osman Nagar

FROM QUIET SUBURB TO PREMIER ADDRESS...

Tellapur – Kollur - Osman Nagar together form a unified residential micro-market in West Hyderabad, straddling the Ramachandrapuram Mandal and Serilingampally zone. Governed under the Hyderabad Metropolitan Development Authority (HMDA) and regulated by TS-RERA, the corridor has transformed from a peripheral suburb into one of Hyderabad's fastest-appreciating premium residential destinations, driven by IT-sector spillover from Gachibowli, the Financial District, and Nanakramguda.

10 Min
Outer Ring Road
Exit 2



20 -25 Min
Gachibowli / HITEC City IT Hub

15 Min
Financial District, Nanakramguda & Kokapet SEZ

40 Min
Rajiv Gandhi International Airport (RGIA) via ORR

Key Highlights

Strong Education & Social Infrastructure Hub

Home to premier schools, colleges, healthcare facilities, religious sites, and lifestyle conveniences within walking distance.

Premium Developer Entry

My Home, Aparna, Rajapushpa, Prestige, NCC Urban and others delivering large-format gated communities.

Osman Sagar Lake Proximity

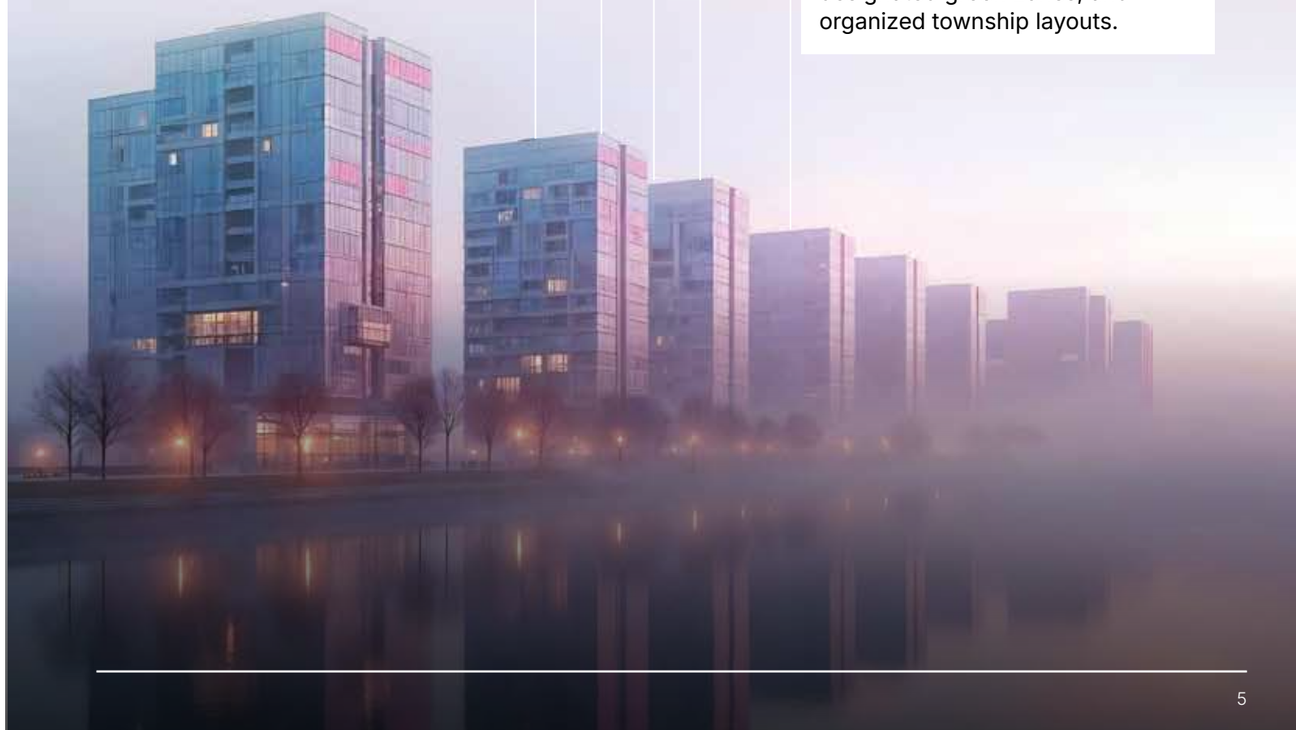
Adjacency to Osman Sagar (Gandipet) reservoir ensures green outlook, restricted industrial activity & superior air quality.

Proximity to Employment Hubs IT Spillover Demand

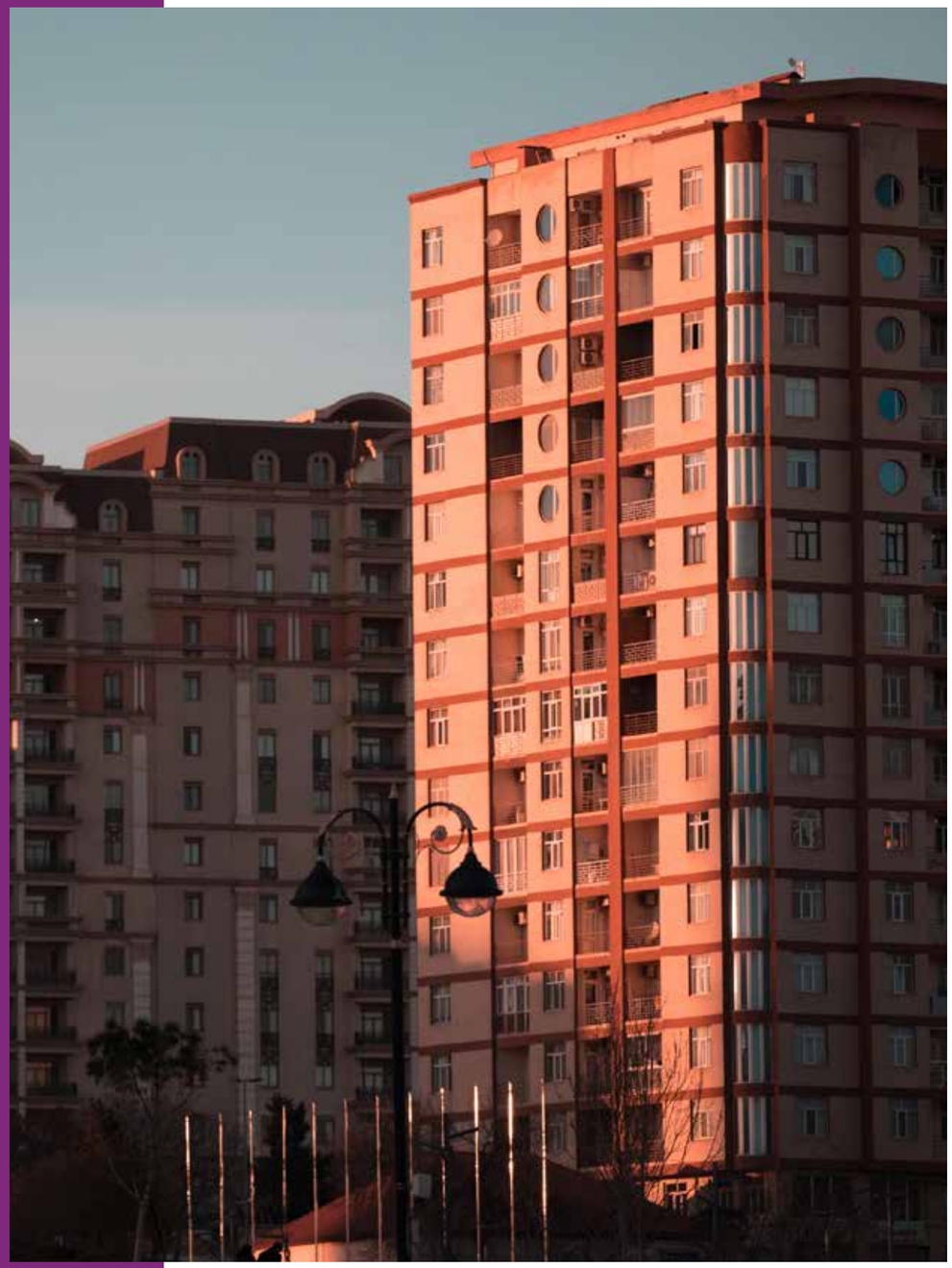
Overflow from saturated Gachibowli, Financial District & Kokapet driving premium demand from tech professionals, CXOs & NRIs.

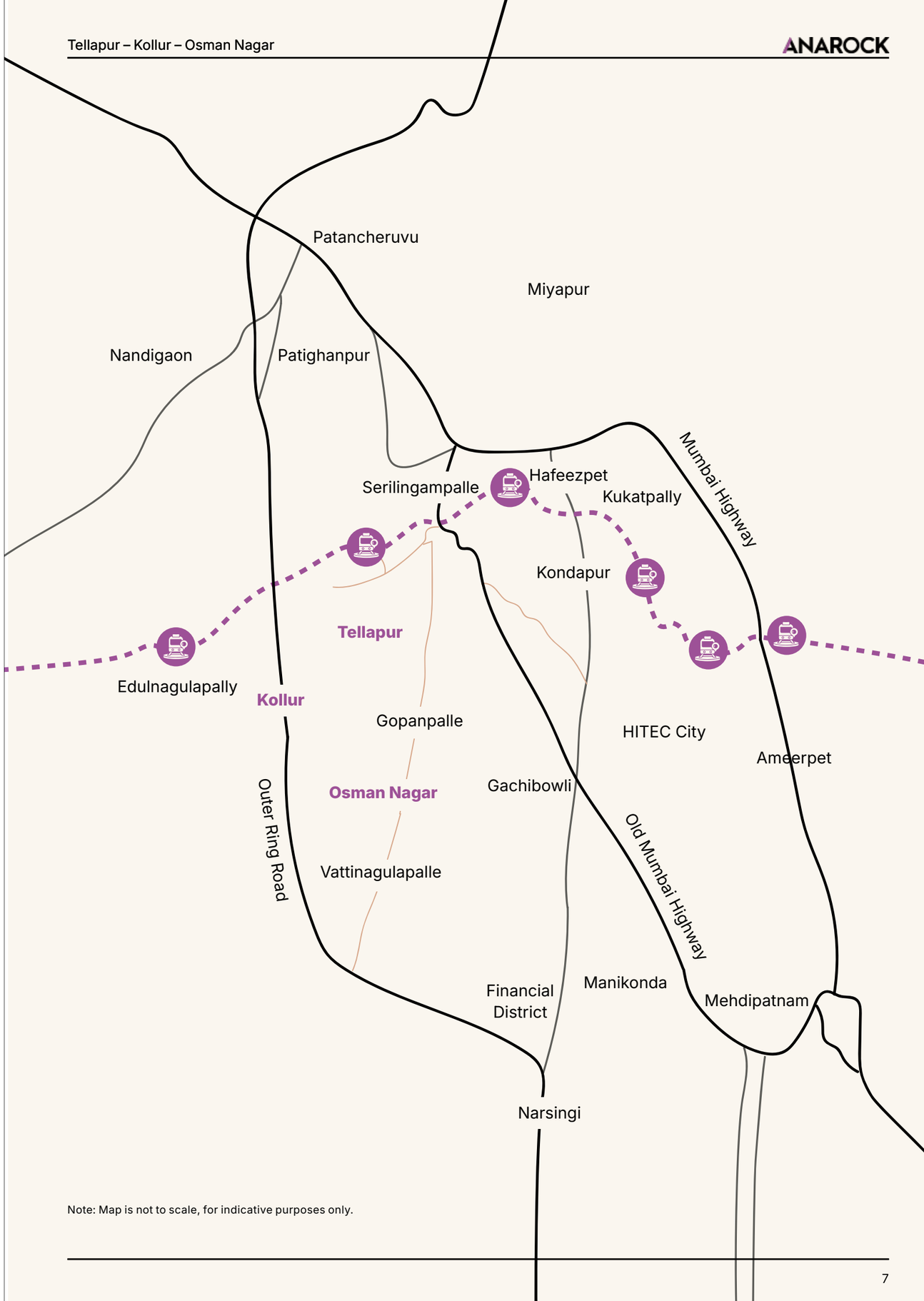
HMDA Master-Planned Growth

Planned development under HMDA master plan — wider roads, designated green zones, and organized township layouts.



The Physical Infrastructure





Note: Map is not to scale, for indicative purposes only.

The Social Backbone

0–5 Minutes

- Tellapur Main Road retail & daily conveniences
- Rajapushpa Lifestyle City commercial hub
- Local pharmacies, clinics & supermarkets
- Aparna & My Home community clubhouses

5–10 Minutes

- Manthan International School, Tellapur
- Glendale Academy, Bachupally (via ORR)
- Tellapur MMTS Railway Station
- Citizens Hospital, Serilingampally
- Inox & PVR Multiplex, Nallagandla

10–15 Minutes

- Meru International School
- Vista School, Tellapur belt
- Continental Hospital, Gachibowli
- Kamineni Hospital, Lingampally
- Forum Sujana Mall, Miyapur

Note: Distances are indicative (in time) and may vary depending on the point of origin.

15–20 Minutes

- ISB Hyderabad (Indian School of Business)
- NALSAR University of Law, Shameerpet (via ORR)
- AIG Hospitals, Gachibowli
- Yashoda Hospitals, Secunderabad
- Inorbit Mall, Miyapur
- Ikea Hyderabad (Hitec City belt)

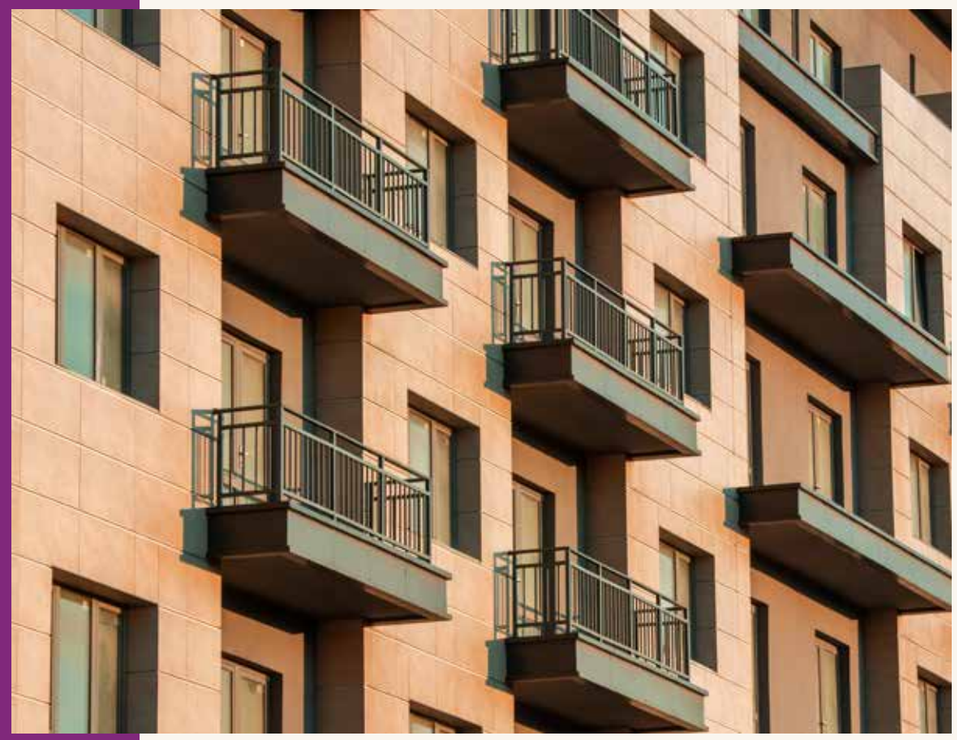
20–30 Minutes

- Rajiv Gandhi International Airport via ORR
- Hyderabad Airport Metro (future)
- HICC Hyderabad International Convention Centre
- ORR access to Shamshabad & NH-44
- Hyderabad Zoo / Nehru Zoo Park

Natural Assets

- Osman Sagar (Gandipet) Lake — recreational & ecological buffer
- Himayat Sagar Reservoir — to the south; no heavy industry buffer zone
- Green lungs via HMDA forest & reserve land along the ridge
- Lower pollution index vs. Gachibowli / HITEC due to lake proximity

Employment Proximity & IT Corridor Analysis



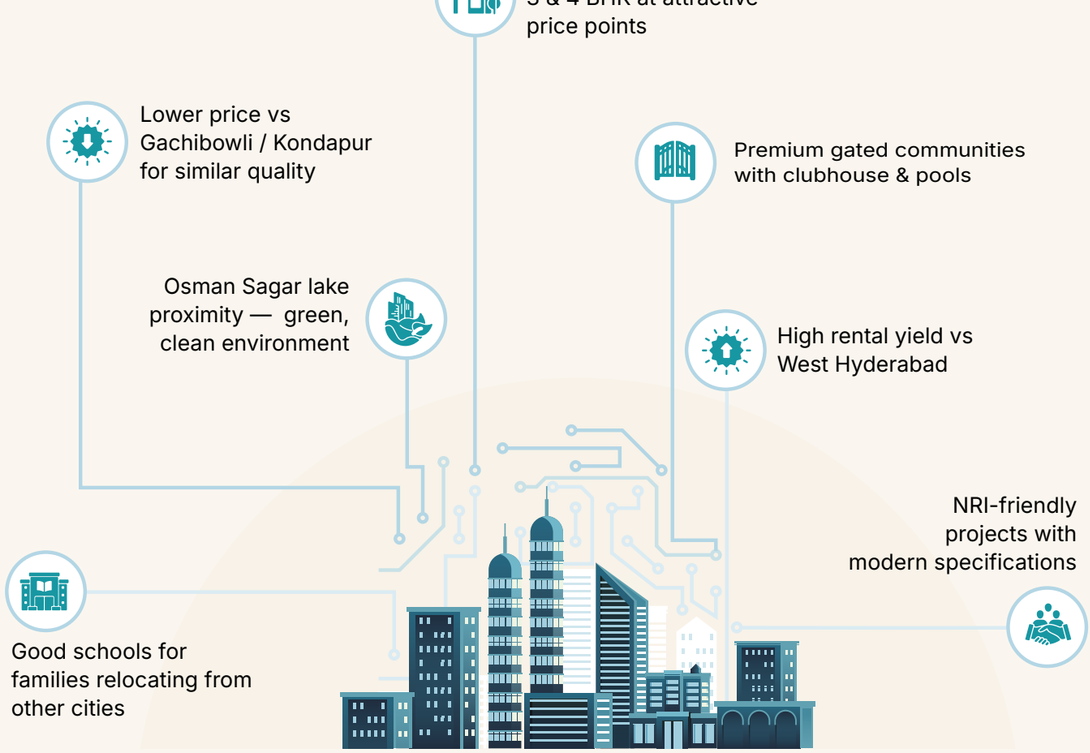
THE ENGINE BEHIND TELLAPUR – KOLLUR - OSMAN NAGAR HOUSING DEMAND

The Tellapur – Kollur - Osman Nagar micro-market derives its residential demand almost entirely from the IT/ITeS employment corridor stretching from Gachibowli to the Financial District and Kokapet. With Hyderabad's IT sector employing over 7 lakh professionals in West Hyderabad alone, and office absorption in the Financial District / Kokapet belt averaging 12–15 mn sqft annually, the spillover housing demand is structural and sustained.

Key Employment Hubs & Distance from Micro-Market

Employment Hub	Key Occupiers	Distance
Financial District, Nanakramguda	Amazon, Google, Microsoft, Deloitte, HSBC, Accenture	~5 km
Gachibowli IT Hub	TCS, Wipro, Infosys, Oracle, Cyient, L&T Infotech	~6 km
HITEC City / Madhapur	Facebook (Meta), Apple, Qualcomm, IBM, Tech Mahindra	~10 km
Kokapet Neopolis SEZ	Hyderabad's emerging 'Manhattan' — premium office belt	~8 km
Nanakramguda FSI Zone	JP Morgan, State Street, ICICI Bank, DXC Technology	~5 km
Lingampally IT Corridor	Syntel, NTT Data, Mphasis, Mindtree, HSBC Tech	~7 km

Why IT Professionals Choose This Belt



Real Estate Snapshot

Total Supply
49,140 Units
(2021 – H1 2026)

Available Inventory
18,385 Units
(As Of H1 2026)

Inventory Overhang
26 Months
(As of H1 2026)

Uc* Available Inventory
91%
(As Of H1 2026)

Average Basic Selling Price Tellapur
INR 8,860 Per Sqft
(On Sbu Area As Of H1 2026)

Price Appreciation Tellapur
96%
(2021 – H1 2026)

Average Basic Selling Price Kollur
INR 6,930 Per Sqft
(On SBU Area As Of H1 2026)

Price Appreciation Kollur
124%
(2021 – H1 2026)

Average Basic Selling Price Osman Nagar
INR 8,220 Per Sqft
(On SBU Area As Of H1 2026)

Price Appreciation Osman Nagar
113%
(2021 – H1 2026)

Average Monthly Rentals
INR 25,000 –30,500
(2BHK – Avg Size 1,000 Sq Ft)

Rent Appreciation
70%
(2021 – H1 2026)

Prominent Budget Segment
INR 1.5 – 2.5 Cr.

Dominant Bhk Type
3 BHK (80% Of Total Supply)
(2021 – H1 2026)

KEY DEVELOPERS (2021 – Q1 2026)

Developer
My Home Constructions
Total Supply
13,800
Projects
04

Developer
Aparna Constructions
Projects
05
Total Supply
5,300

Developer
Anvita Group
Projects
02
Total Supply
3,700

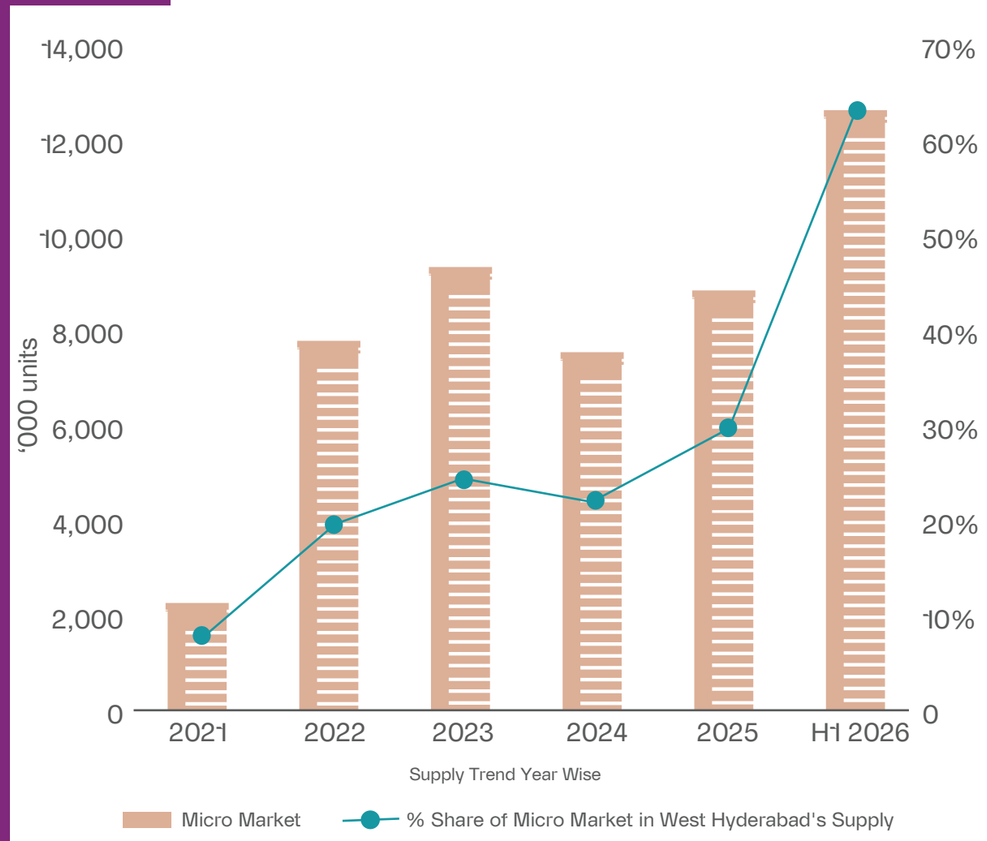
Developer
Prestige Group
Total Supply
5,000
Projects
01

Developer
Rajapushpa Properties Pvt Ltd
Total Supply
5,000
Projects
02

Tellapur – Kollur – Osman Nagar
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Real Estate Statistics

SUPPLY DYNAMICS



Source - ANAROCK Research & Advisory

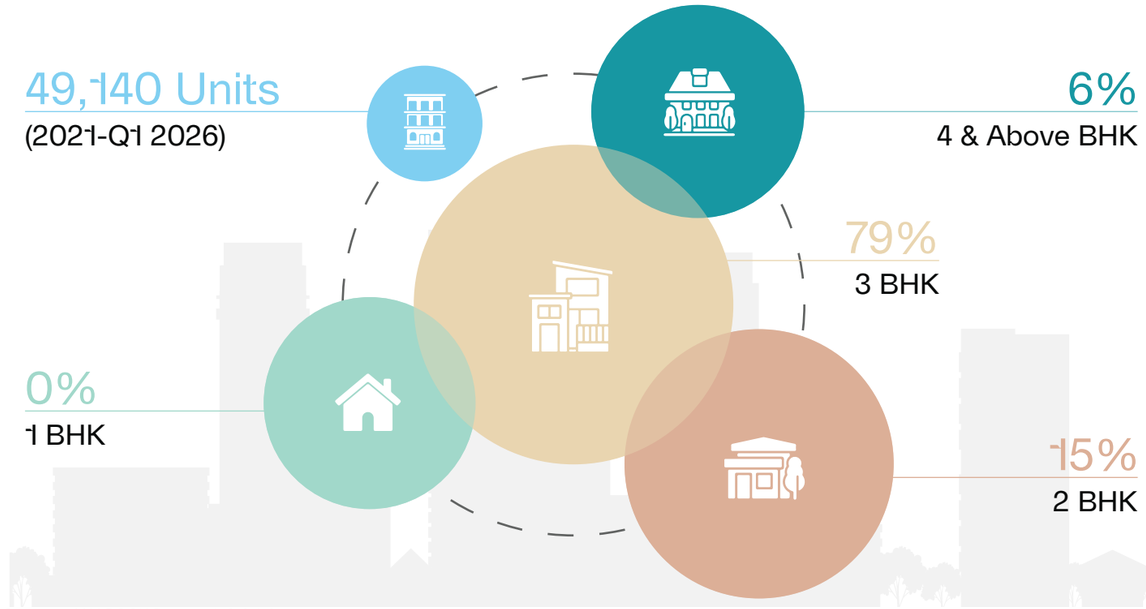
The Tellapur–Kollur–Osman Nagar micro market has emerged as one of the key residential growth corridors of West Hyderabad, supported by strong infrastructure development, availability of large land parcels, and increasing developer focus towards integrated township and premium residential developments.

H1 2026 witnessed a sharp rise, with the micro market contributing approximately 64% of West Hyderabad's new supply, indicating strong developer confidence and continued expansion of this corridor.

This growth has been driven by its strategic location along the western growth axis of Hyderabad, proximity to major employment hubs such as HITEC City, Financial District, and Gachibowli, and improving connectivity through key road networks.

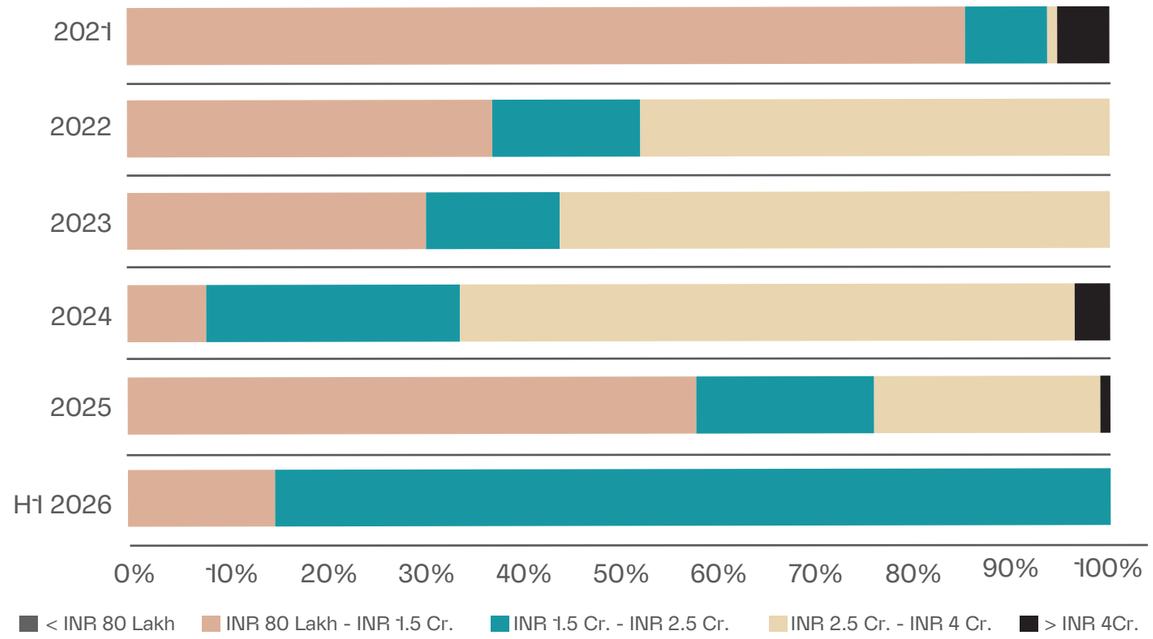
BHK ANALYSIS AS PER SUPPLY

In terms of BHK configuration of the residential launches, the 3-BHK dominates the market, constituting 79% of the total supply since 2021. The 2-BHK and 4 & Above BHK accounts for 15% and 6%, respectively.



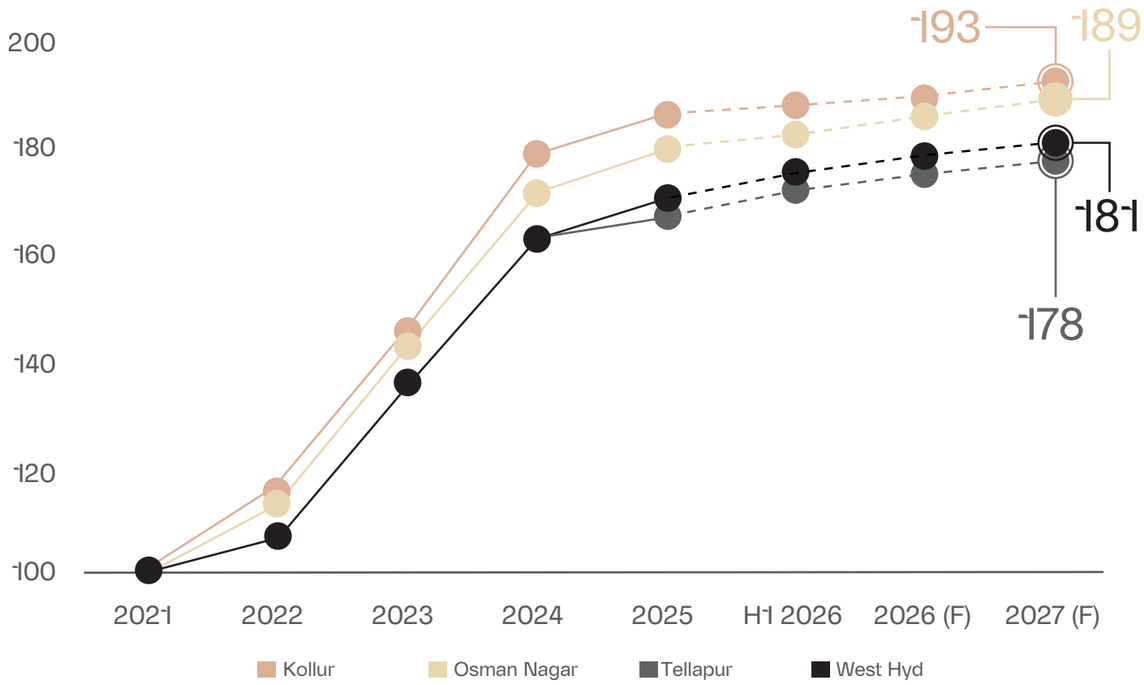
Source - ANAROCK Research & Advisory

SUPPLY AS PER BUDGET SEGMENTATION



Source - ANAROCK Research & Advisory

PRICE APPRECIATION INDEX

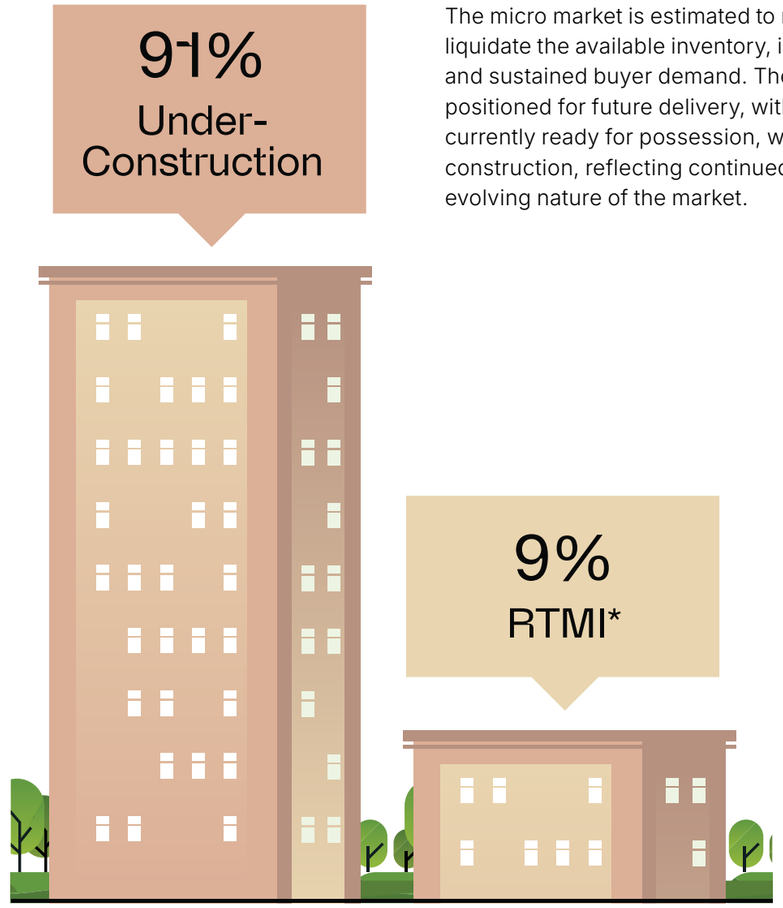


Price Indexed to 2021 | Source: ANAROCK Research & Advisory

Since 2021, the micro market has recorded strong price appreciation, with residential values nearly doubling to reach INR 6,900–INR 8,800 per sq. ft. by H1 2026. Despite this growth, pricing remains competitive compared to West Hyderabad (INR 9,471 per sq. ft.), highlighting further appreciation potential driven by infrastructure development and market maturity.

Kollur remains the most affordable at INR 6,930 per sq. ft., followed by Osman Nagar at INR 8,220 and Tellapur at INR 8,860 per sq. ft., supported by strong demand.

AVAILABLE INVENTORY

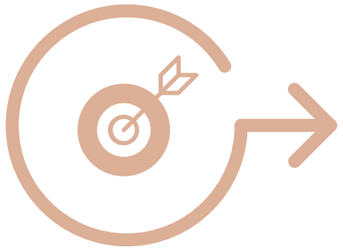


The micro market is estimated to require approximately 26 months to liquidate the available inventory, indicating a healthy absorption pace and sustained buyer demand. The existing inventory is largely positioned for future delivery, with only around 9% of the units currently ready for possession, while the remaining 91% are under construction, reflecting continued developer activity and the evolving nature of the market.

* Ready-to-move-in | Source: ANAROCK Research & Advisory

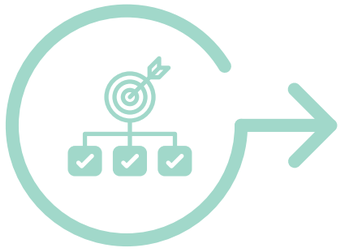


Strategic Snapshot



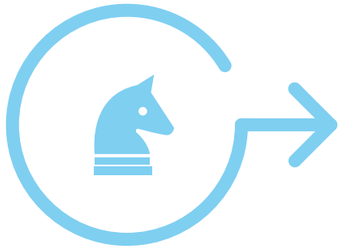
Strengths

- Direct proximity (15–20 min) to Hyderabad's largest IT employment clusters — Financial District, Gachibowli, Nanakramguda, HITEC City
- Osman Sagar Lake adjacency — rare ecological buffer that restricts industrial sprawl and maintains green character
- HMDA master-planned — orderly development with wide roads, green reserves and regulated densities
- Strong branded developer presence (My Home, Rajapushpa, Aparna, NCC Urban, Prestige) raising quality standards
- Robust rental demand from IT workforce (4%+ yield); low vacancy rates support investor confidence



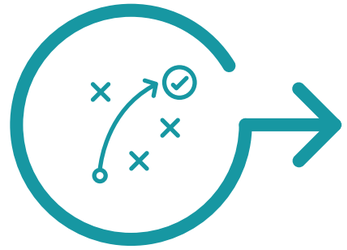
Weaknesses

- Still-developing internal road network in Osman Nagar , some pockets suffer from dust, unfinished roads and limited last-mile connectivity
- Public transport remains limited — over-dependence on private vehicles; MMTS serves Tellapur but not Osman Nagar directly.
- Power supply and water availability in some sub-pockets are intermittent — project-level infrastructure plugs the gap but adds cost
- Land fragmentation and multiple ownership patterns complicate large-format township delivery in Osman Nagar



Oppurtunities

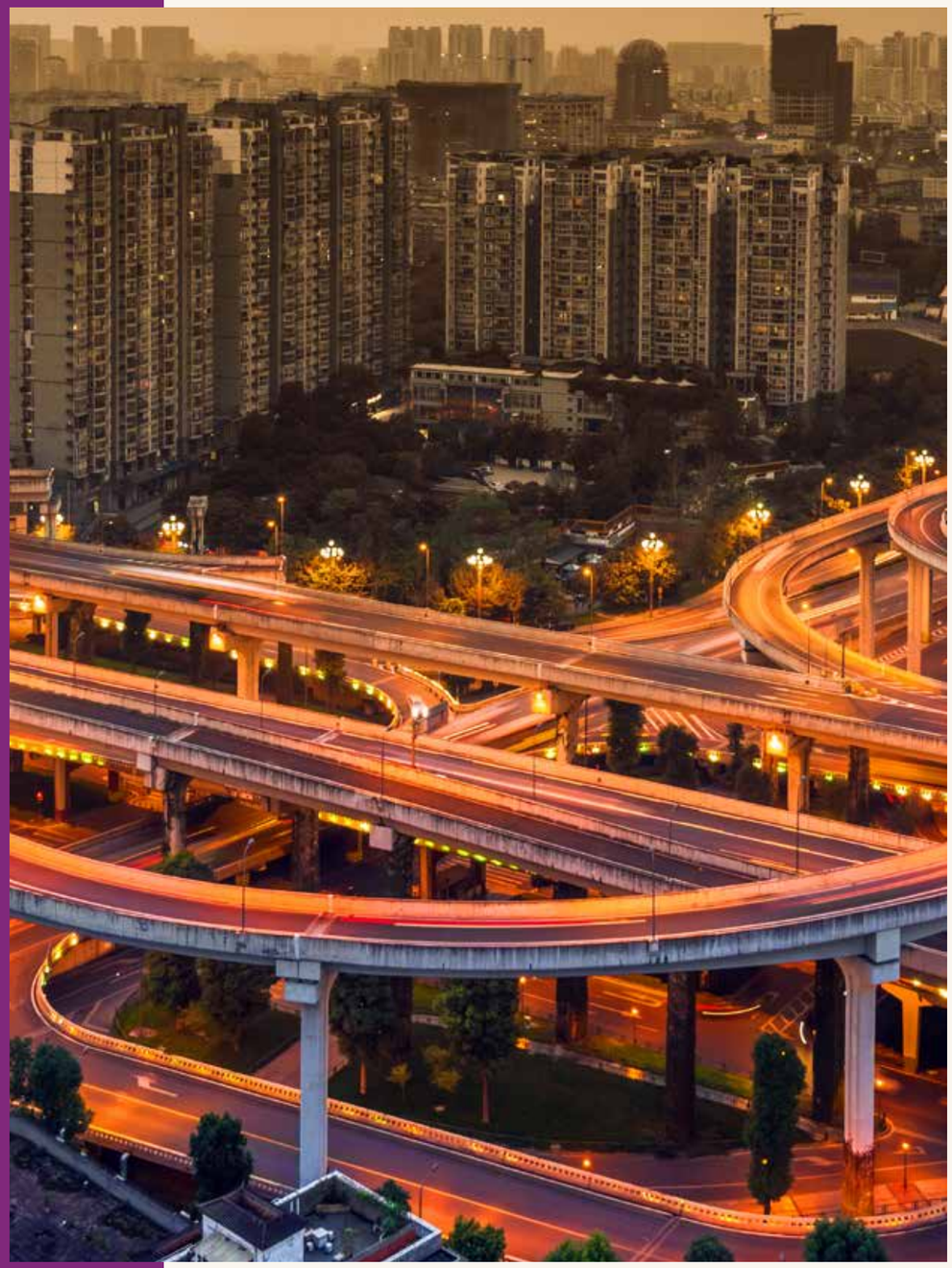
- Hyderabad Metro Phase 2 extension toward Gachibowli / Financial District corridor would transform accessibility.
- Neopolis SEZ (Kokapet) expansion and new IT park developments will generate significant additional housing demand from the west
- ORR Exit 2 widening and the Velimela–Kollur road improvement will unlock as next-wave value appreciation zone
- HMDA's Smart City and township-scale approvals enabling large integrated communities with self-sufficient amenities
- Rising NRI demand for green, spacious housing at sub-Bangalore prices — Tellapur is emerging as a preferred NRI destination



Threats

- TS-RERA compliance delays and approval bottlenecks — TGRERA enforcement wing newly constituted, but speed of resolution uncertain
- Overconcentration of IT sector — any macro slowdown (tech layoffs, hiring freeze) would disproportionately impact demand
- Traffic congestion risk as the corridor densifies — without Metro or BRT solutions, road congestion could erode the liveability advantage
- Potential for oversupply in specific price bands if multiple large projects launch simultaneously

A Way Forward



Metro Phase 2, ORR widening, and the Velimela–Tellapur road improvements will systematically reduce travel times and trigger the next wave of capital appreciation.

Osman Sagar Lake's protected status is a permanent structural moat — no industrial or heavy commercial development can dilute the green character of the corridor.

Yields & rising rents (15–20% YoY) and low vacancy form a virtuous cycle — making Tellapur one of Hyderabad's strongest landlord markets.

Structural IT Demand

Hyderabad IT employment is projected to grow 12–15% annually through 2030. Tellapur sits at the geographic sweet spot of this expansion — 5–20 min from every major IT campus.

Infrastructure Tailwinds

INR 25,000+ Cr. GDV Pipeline

Branded developers have committed large land parcels to the corridor — ensuring quality supply that will reset pricing benchmarks over the next 5 years.

Green Premium: Sustainable Moat

NRI & HNI Demand Rising

Rising demand from NRIs seeking green, spacious housing below Bangalore/Pune pricing, and from HNIs upgrading from older Kondapur / Jubilee Hills stock.

Rental Yield Compounding

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Anarock is a leading independent real estate services company operating across India and the Middle East. Established in 2017, Anarock draws upon a legacy of over three decades of real estate expertise and advises clients across all property sectors including residential, commercial, retail, hospitality, land, industrial and logistics, data centres and flexible workspaces.

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