Residential Market Viewpoints

Pune Q3 2026

ANAROCK
VALUES OVER VALUE

City Snapshot

LAUNCHES
18,750 Units
48% Quarterly Change

SALES
15,700 Units
20% Quarterly Change

AVAILABLE INVENTORY
86,900 Units
4% Quarterly Change

AVERAGE QUOTED BASE SELLING PRICE
₹ 12,209/sf

Note: Basic selling price on Carpet Area



A Bird's Eye View

Pune Key Micro-markets	RENTAL VALUES Avg. Quoted Rent (₹/month)	RENTAL VALUES Quarterly Change (%)	CAPITAL VALUES Avg. Quoted Rate (₹/sf)	CAPITAL VALUES Quarterly Change (%)	OUTLOOK Short-term
Wagholi	20,000-31,000	1%	9,900	4%	↑
Hinjawadi	24,500-35,000	1%	11,353	2%	↑
Talegaon Dabhade	12,000-17,500	2%	6,628	4%	↑
Wakad	25,500-34,000	1%	12,445	2%	↑
Undri	17,500-25,000	0%	8,946	1%	↑

Zonal Classification

Central	Shivaji Nagar | Sadashiv Peth | Kasba Peth | Prabhat Road | Deccan Gymkhana
North	Moshi | Talegaon | Dabhade | Chikhali | Viman Nagar | Ravet | Punawale | Chakan | Lohegaon | Pimpri Chinchwad
South	Sinhgad Road | Undri | Kondhwa | Ambegaon Budruk | Dhayari | Handewadi | NIBM Annexe
East	Wagholi | Kharadi | Hadapsar | Manjari | Wadgaon Sheri | Kalyani Nagar | Magarpatta City | Sholapur Road
West	Kothrud | Hinjewadi | Wakad | Baner | Bavdhan | Pirangut | Pashan | Gahunje

↑ 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 Carpet Area
Available inventory includes units from projects that are launched but yet not sold, despite the launch timelines and construction progress

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Key Project Launches

Goyal My Home Sanctuary Phase II
Goyal Properties
Mamurdi
435 units
₹ 9,400/sqft

Ashtavinayak City Phase III
Ashtavinayak Developers
Fursungi
434 units
₹ 7,850/sqft

Kolte The Winds Phase I
Kolte Patil Developers Ltd
Bhugaon
407 units
₹ 11,400/sq.ft

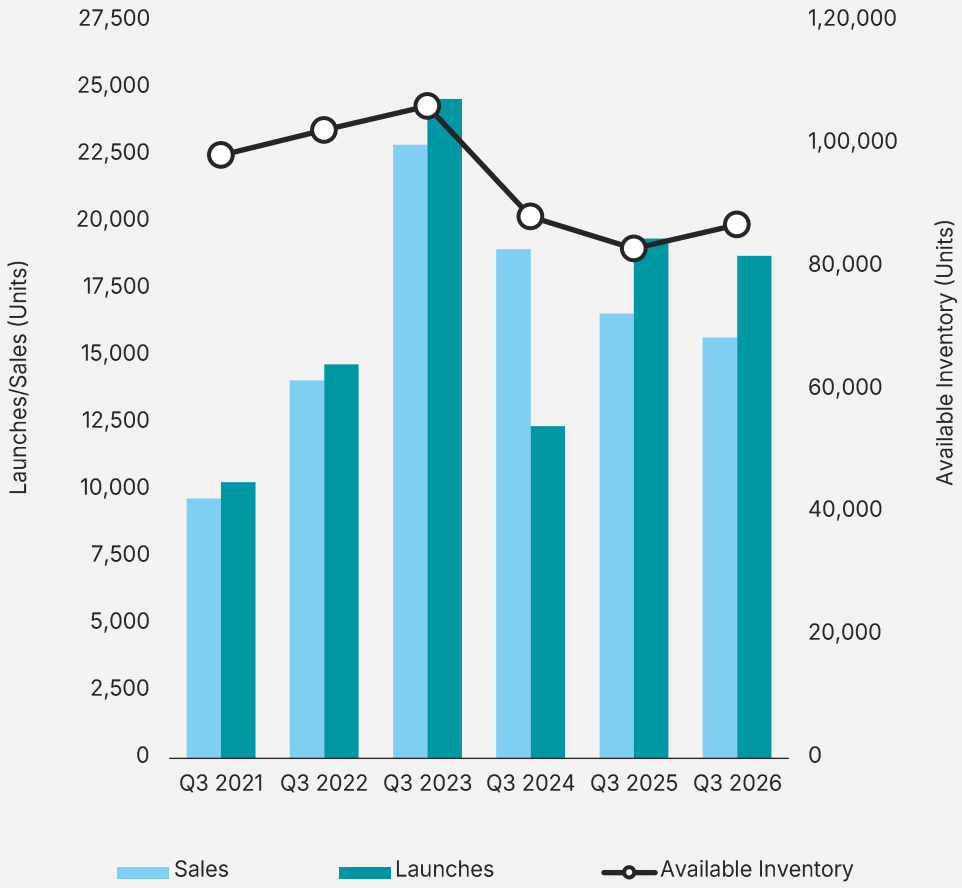
Above average basic selling prices are quoted on Carpet Area

Residential Market Viewpoints

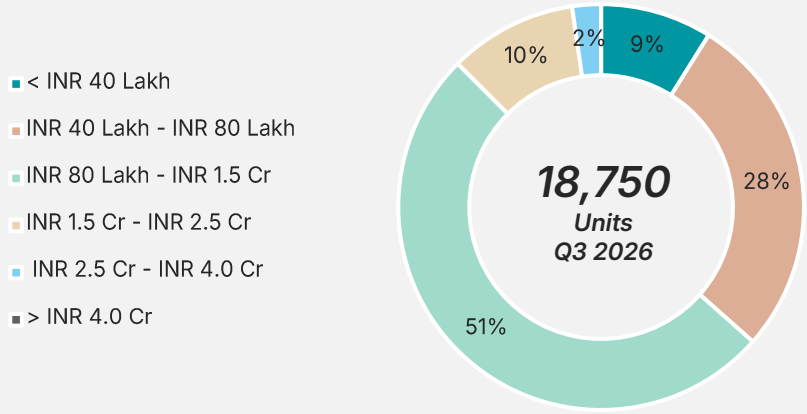
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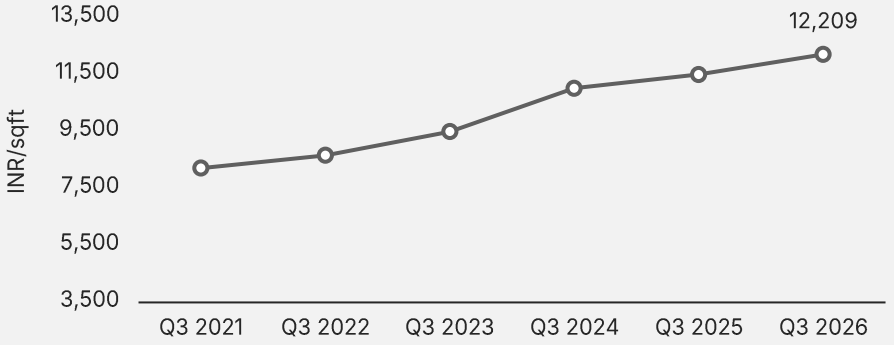
DEMAND SUPPLY DYNAMICS



SUPPLY BUDGET-SEGMENTATION



PRICE TREND



Average Quoted Rent for 2 BHK apartment measuring 700 sf; Average Quoted Rate (Base Price) on Carpet Area
Available inventory includes units from projects that are launched but yet not sold, despite the launch timelines and construction progress

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Launches

Upper-mid segment overtakes lower-mid to dominate Pune's Q3 2026 new residential launches

In Q3 2026, Pune accounted for approximately 16% of new residential launches across India's top seven cities, introducing roughly 18,750 units. Despite this volume, overall launch activity in the city softened on year-on-year basis by 4% but registered a rise on quarter-on-quarter basis by 48%.

At the zonal level, North Pune led the market, capturing a robust 49% share of the city's new launches. This zone recorded a growth of 66% QoQ and a 31% on YoY basis. West Pune followed, contributing 20% to the total supply; while it experienced a 20% yearly decline, it maintained a 55% growth QoQ. Similarly, East Pune faced moderate growth of 27% QoQ, despite the decline of 46% YoY. Meanwhile, South Pune showed robust growth of 26% QoQ and an annual growth of 81%.

In terms of ticket size, the upper-mid segment overtook the lower-mid category to dominate the quarter's new housing supply. The upper-mid segment secured a 51% share of total launches, followed by the lower-mid segment at 28%. This scenario was totally opposite in the last quarter.

Sales Trend

Pune's housing sales experienced a broad-based growth across zones.

Pune gained third position in India's residential real estate market in Q3 2026, accounting for approximately 16% of total housing sales across the top seven cities. The city witnessed the sales of approximately 15,700 units this quarter with a growth of 20% on QoQ basis while a moderate decline of 6% on YoY basis.

A zonal analysis indicates widespread growth, with positive expansion observed across most zones. North Pune maintained its position as the market leader by capturing 43% of total city sales, it recorded quarterly and annual growth of 45% and 17%, respectively. West Pune followed with a 25% share, registering growth of 5% quarter-on-quarter but a decline of 28% year-on-year. Similarly, East Pune constituted 20% of the city's sales with a marginal growth of 1% QoQ but a moderate decline of 16% YoY. South Pune recorded a growth of 25% quarterly as well as on annual basis. Meanwhile, Central Pune's contribution to the city's total sales remained minimal while also registering both quarterly and annual downturns.

Available Inventory

Pune sees a moderate increase in available housing inventory across most of its zones.

In Q3 2026, Pune's available residential inventory stood at approximately 86,900 units, accounting for nearly 14% of the total stock across India's top seven cities. Inventory levels saw an increase in both quarter-on-quarter (QoQ) and year-on-year (YoY) basis by 4% and 5%, respectively.

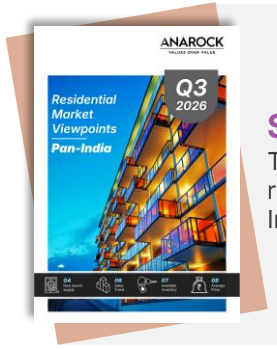
In terms of zonal distribution, North Pune dominated with nearly 41% of the total available stock, followed by East Pune (25%) and West Pune (20%). Together, these three micro-markets collectively comprised an 86% share of the city's available inventory. Notably, Central Pune registered the highest QoQ decline in available inventory across all zones though its contribution to the available inventory remained marginal. South Pune maintained a relatively smaller footprint of 13% contribution in Pune's residential sales.

The city's overall inventory overhang moderately raised at 17 months in Q3 2026, up by one month from the preceding quarter but up by two months compared to the 15-month overhang recorded in Q3 2025. This steady absorption rate reflects a balanced housing market, where available supply remains closely matched with buyer demand.



Outlook

Pune's residential market is expected to maintain its growth trajectory, supported by infrastructure expansion, GCC growth and sustained housing demand. The planned phased opening of Metro Line 3, along with the Pune Inner Ring Road and Ramwadi - Wagholi Metro, is expected to strengthen key residential and employment corridors. Maharashtra's target of creating around 4 lakh jobs through GCC expansion is expected to strengthen Pune's employment ecosystem, building on its established manufacturing base and growing technology and IT-ITeS presence, thereby supporting housing demand. With new launches gaining momentum alongside healthy absorption, infrastructure-led micro-markets are expected to remain key growth corridors.



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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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