

Residential Market Viewpoints PAN INDIA

**Q1
2025**



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Foreword

Indian Residential Real Estate witnessed a correction in Q1 2025 after an extended bull run in the previous year

Skyrocketing residential prices and geopolitical headwinds have tapered the Indian housing market's bull run in Q1 2025. After consecutive quarters of robust performance, housing sales across the top seven cities declined by 28% year-on-year, with approximately 93,300 units sold in Q1 2025 compared to over 1,30,150 units in Q1 2024.

Average property prices across the top seven cities saw a substantial 17% annual increase, with the National Capital Region (NCR) and Bengaluru recording the highest appreciations at 34% and 20%, respectively. Such dramatic price appreciation has inevitably affected affordability and dampened demand across market segments.

Despite the market correction, Bengaluru, among the top 7 cities, has shown remarkable resilience. It experienced the lowest sales decline of 16%, a testament to its stability in the face of market challenges. The Mumbai Metropolitan Region (MMR) and Pune continued to dominate the residential landscape, accounting for 51% of total housing sales. However, neither region was immune to the market correction, with MMR witnessing a 26% annual decline in sales and Pune experiencing an even steeper 30% reduction. Hyderabad emerged as the most severely impacted market, with housing sales plummeting by 49% compared to Q1 2024.

On the supply side, new launches across the top seven cities remained above the 1,00,000-unit threshold but registered a 10% year-on-year decrease, with approximately 100,020 units introduced compared to 1,11,000 units in Q1 2024. MMR and Bengaluru dominated new supply, collectively accounting for 52% of total launches. Interestingly, while MMR experienced a 9% annual decline in new supply, Bengaluru recorded a robust 26% increase. NCR and Kolkata were the other markets that defied the overall trend, registering impressive yearly growth in new launches at 52% and 26%, respectively. Hyderabad witnessed the sharpest contraction, with new supply decreasing by 55% year-on-year.

A notable shift in the composition of new launches reveals the market's increasing tilt toward premium segments. Luxury and ultra-luxury homes priced above INR 1.5 crore dominated the new supply with a 42% share, followed by premium housing (INR 80 lakh to INR 1.5 crore) at 27%. The mid-segment (INR 40-80 lakh) comprised only 18% of new supply, while affordable housing (below INR 40 lakh) represented a mere 12% of launches, reflecting developers' strategic focus on higher-margin projects.

Despite the slowdown in sales, available inventory across the top seven cities decreased by 4% year-on-year to approximately 5,59,800 units by the end of Q1 2025. Pune witnessed the most significant inventory reduction at 16%, indicating healthier absorption relative to the new supply. Conversely, Bengaluru's unsold inventory surged by 28% to roughly 58,700 units, reflecting the substantial increase in new launches within the city.

Overall, the residential real estate sector is undergoing a recalibration phase. Escalating prices reaching resistance levels and global economic uncertainties have temporarily cooled the overheated housing market. This correction phase follows several quarters of exceptional growth. It may represent a necessary adjustment toward more sustainable market dynamics rather than a fundamental shift in the long-term trajectory of Indian residential real estate.

ANUJ PURI
Chairman
ANAROCK Group



Key Highlights

Q1 2025 | Pan-India

NEW LAUNCH SUPPLY TREND

The residential market across India's top 7 cities experienced a moderate contraction in Q1 2025, with new launches reaching approximately 1,00,000 units. It represents a 10% year-on-year decline compared to the 1,10,900 units launched in Q1 2024 while showing a 10% increase from the 90,750 units recorded in Q4 2024.

MMR (Mumbai Metropolitan Region), Bengaluru, Pune, and NCR (National Capital Region) emerged as the primary contributors to new residential supply, collectively accounting for 80% of the total launches during Q1 2025.

Regarding budget segmentation, the high-end segment (INR 80 lakh - INR 1.5 Cr) demonstrated significant demand, capturing the highest market share of 27% during the quarter. The ultra-luxury (> INR 2.5 Cr) and luxury (INR 1.5 Cr - INR 2.5 Cr) segments followed with shares of 22% and 21%, respectively.

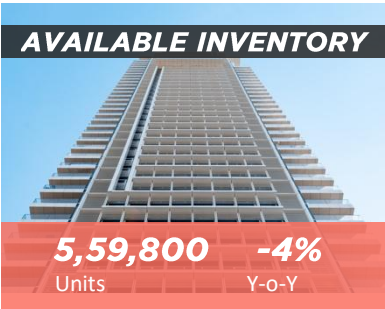
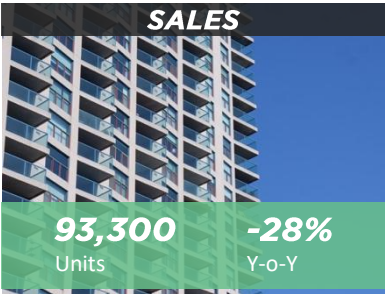
SALES TREND

The residential real estate market showed signs of stabilization in Q1 2025, with approximately 93,300 units sold. This figure indicates a 28% decline year-over-year and a 9% decrease quarter-over-quarter, primarily due to skyrocketing residential prices and the overall geopolitical headwinds.

MMR, Pune, Bengaluru, and NCR remained the dominant markets, collectively accounting for 80% of total residential sales in the current quarter.

AVAILABLE INVENTORY

Despite new launches remaining above the 1 lakh mark in this quarter, the available inventory across the top 7 cities contracted by 4% on an annual basis, decreasing from approximately 5.81 lakh units at the end of Q1 2024 to 5.59 lakh units by the close of Q1 2025. MMR, Hyderabad, NCR, and Pune collectively represent 79% of the total housing inventory currently available across the top 7 cities in India.



TOP 7 CITIES

City	New Launches	Sold Units	Available Inventory	Avg. Price (INR/sf)
NCR	11,100	12,500	84,500	8,330
MMR	30,750	31,600	1,80,100	16,900
Bengaluru	20,850	15,000	58,700	8,650
Pune	16,850	16,100	81,400	7,800
Hyderabad	10,300	10,100	97,950	7,550
Chennai	4,750	4,050	29,100	6,900
Kolkata	5,400	3,900	28,050	5,950

Notes:

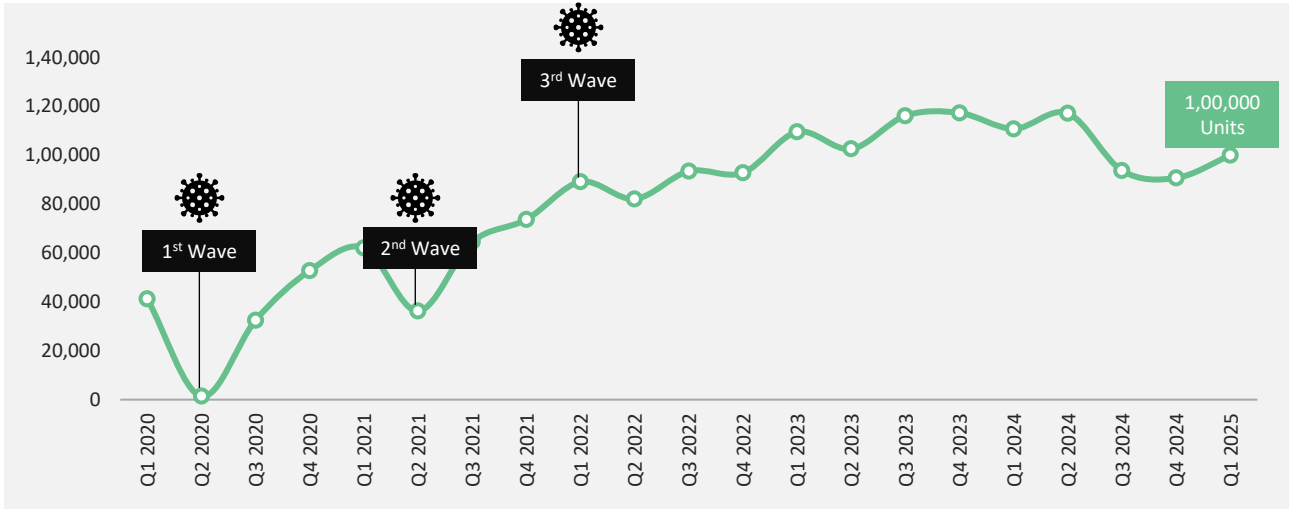
- Pan-India refers to top 7 cities of India only.
- Average price in INR/sf as quoted on BSP on BUA.
- Available inventory includes units from projects that are launched but yet not sold, despite the launch timelines and construction progress.
- Rounding may result in minor variations between the stated and calculated values.

Budget Segmentation:

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

New Launch Supply Trend

Q1 2025 | Pan-India



- 1 The number of new units launched reached approximately **1,00,000 units in Q1 2025**, compared to 1.11 lakh units in Q1 2024 and 90,750 units in Q4 2024. It represents a **decline of 10% year-on-year** and an **increase of 10% quarter-on-quarter**. The 10% increase quarter-on-quarter compared to Q4 2024 reflects market recovery after the previous quarter's slowdown. However, the 10% year-on-year decline indicates a **cautious developer sentiment amid economic headwinds, despite the sequential quarterly improvement**.
- 2 The current trajectory suggests a **market stabilization phase rather than a fundamental slowdown**. Developers **strategically pace new launches** in response to accumulated inventory and evolving buyer preferences. Despite variations in the number of new residential unit launches, the **overall market volume remains substantially higher than pre-pandemic levels**, with current launch volumes approximately double those seen in Q1 2020. This recalibration indicates a **mature market approach** where quality and absorption rates are a priority over merely increasing supply volumes.

TOP 7 CITIES

Among the top 7 metropolitan cities in Q1 2025, **MMR maintained its market leadership** with 30,750 new residential launches, representing approximately 31% of the total launches across the top seven cities. **Bengaluru secured the second position** with a 21% share, followed by Pune at 17%, highlighting the continued strength of the western and southern residential markets. NCR and Hyderabad contributed 11% and 10% shares, respectively, while Chennai and Kolkata contributed 5% each to the overall launches.

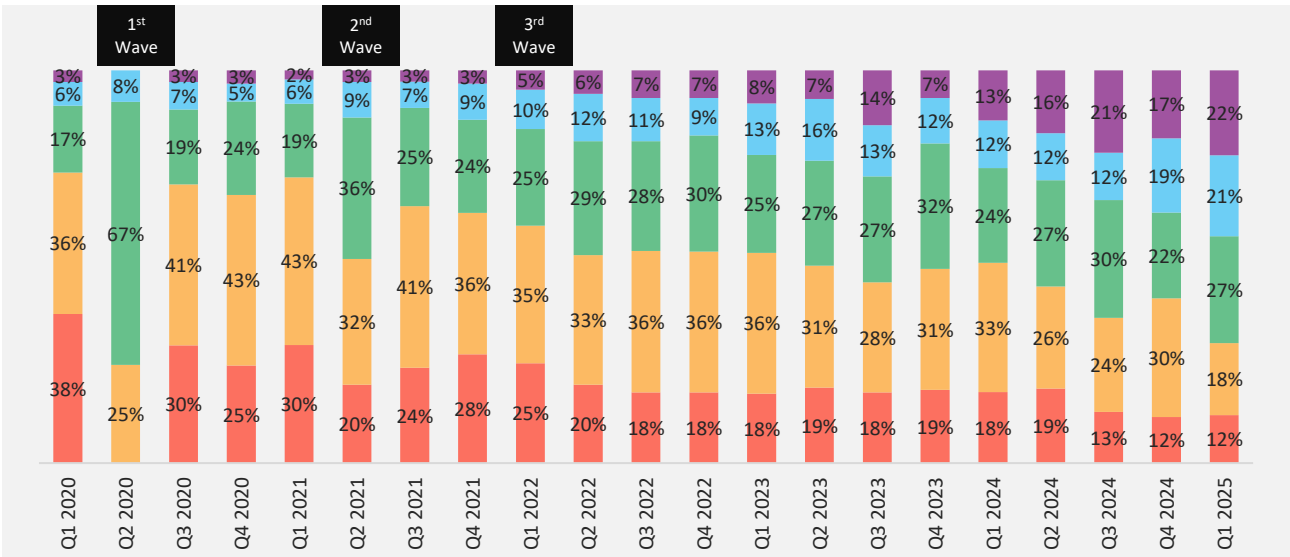
Quarter-over-quarter analysis reveals Pune as the standout performer, with an impressive 62% growth compared to Q4 2024. Hyderabad and Chennai also demonstrated robust quarterly growth at 34% and 23%, respectively. Conversely, NCR experienced a substantial decline of 24% from the previous quarter, while Bengaluru also contracted by 7%. **On a year-over-year basis, NCR displayed remarkable growth of 52%**, followed by Bengaluru and Kolkata at 26% each. However, Hyderabad witnessed a significant decline of 55% compared to Q1 2024, with Chennai and MMR also showing negative annual growth at 35% and 9%, respectively. This quarter's data indicates a **recalibration phase, with developers adjusting launch volumes** in response to **evolving demand patterns** across India's residential markets.

City	Q1-2025	Q4-2024	Q1-2024	Q-o-Q	Y-o-Y
NCR	11,100	14,600	7,300	-24%	52%
MMR	30,750	27,000	33,800	14%	-9%
Bengaluru	20,850	22,550	16,500	-7%	26%
Pune	16,850	10,400	18,800	62%	-10%
Hyderabad	10,300	7,700	23,000	34%	-55%
Chennai	4,750	3,850	7,300	23%	-35%
Kolkata	5,400	4,700	4,300	15%	26%



New Launch Supply Trend

Q1 2025 | Pan-India by Budget Segmentation

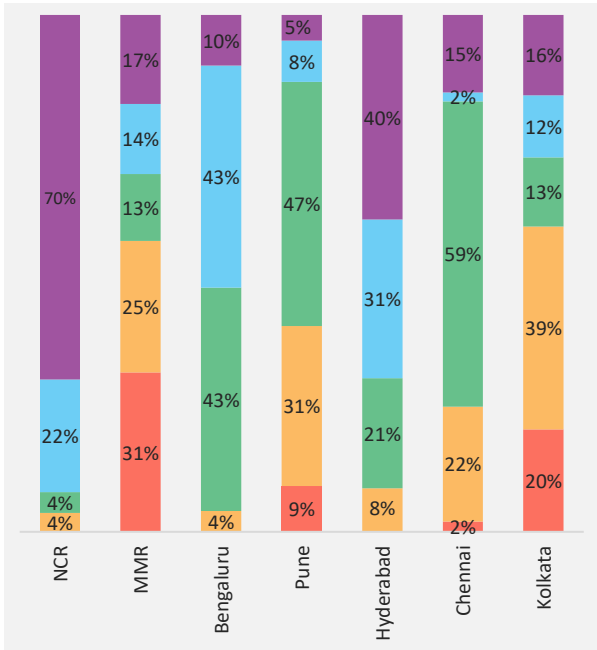


- 1** **High-end residential units** priced between INR 80 lakh and INR 1.5 Cr **account for 27%** of all new launches during Q1 2025. This trend highlights the growing demand for premium residences, driven by rising disposable incomes among urban professionals, increased foreign direct investment in real estate, and evolving lifestyle aspirations of the emerging upper-middle class. The **ultra-luxury segment (>INR 2.5 Cr) followed closely with a 22% share**, reflecting robust demand from high-net-worth individuals seeking exclusive amenities in prime micro markets despite economic fluctuations. The luxury segment (INR 1.5 Cr - INR 2.5 Cr), commanding the third-highest share at 21%, continues to serve discerning buyers seeking sophisticated living spaces with premium amenities. The **affordable housing segment (< INR 40 lakh) remained stable Q-o-Q** at 12%, while the mid-end segment (INR 40 lakh - INR 80 lakh) accounted for 18% of the overall new launches.
- 2** Comparative analysis between Q1 2025 and Q4 2024 launches reveals that all three price segments—**high-end, luxury, and ultra-luxury—recorded growth of 5%, 2%, and 5%**, respectively. Conversely, the **mid-segment is the only housing category that experienced a decline of 12%**. This correction may also reflect developers' strategic realignment to capitalize on higher profitability in premium segments amidst increasing land acquisition and construction expenses.

TOP 7 CITIES

The residential real estate market across India's top seven cities witnessed a significant shift in new launch supply patterns during Q1 2025 compared to Q4 2024. The **ultra-luxury segment demonstrated substantial growth** in Hyderabad, NCR, and Chennai. **Hyderabad exhibited the most dramatic transformation, surging by 28%** from 11% to 40%, indicating a strategic pivot toward high-value developments. Similarly, **NCR displayed remarkable growth from 45% to 70%**. **Chennai** experienced moderate expansion from **3% to 15%**, likely due to increasing land costs and evolving buyer preferences. Conversely, **affordable housing saw diminished focus**, most notably in **Hyderabad (4% to 0%)** and **NCR (22% to 0%)**, signaling developers' reduced interest in this segment due to margin pressures and land cost escalations. **MMR** presented an outlier trend, with **affordable housing share increasing from 19% to 31%**.

The **high-end segment strengthened in Bengaluru (29% to 43%)** and **Pune (27% to 47%)**, reflecting these cities' robust employment markets and steady demand from technology sector professionals. The **luxury segment grew the highest in Kolkata by 10%** (2% to 12%). Overall, the data indicates a **market-wide recalibration toward higher-value properties**, driven by escalating construction costs, changing consumer preferences, and developers' pursuit of improved profit margins in an increasingly competitive landscape.

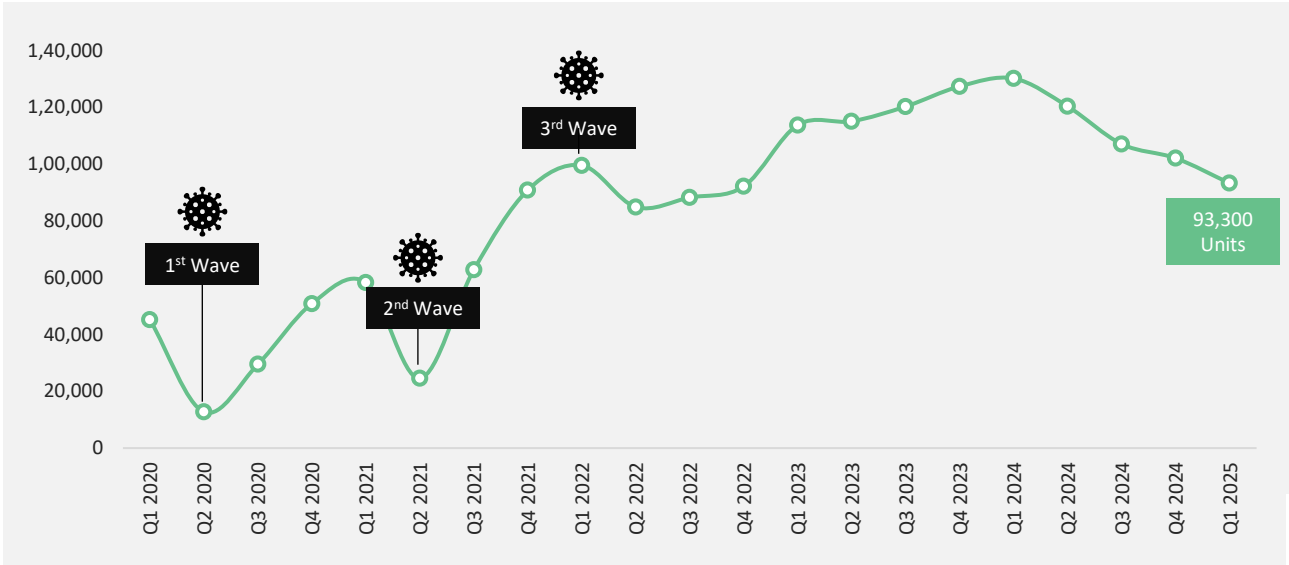


Budget Segmentation:

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

Housing Sales Trend

Q1 2025 | Pan-India



- 1 The Indian residential real estate market **declined in Q1 2025**, with sales volume registering approximately 93,300 units across the top seven cities. This represents a **9% decline compared to Q4 2024** and a **28% decline compared to Q1 2024**, when the market witnessed record-high sales exceeding 1.3 lakh units.
- 2 Several factors have contributed to this **moderation in market momentum**. The **sustained price appreciation** witnessed throughout 2024 has reached threshold levels in many cities, **affecting affordability metrics for potential homebuyers**. Additionally, the **prevailing global geopolitical uncertainties** have introduced an element of caution among investors and end-users alike. This cooling period will likely prompt **developers to recalibrate their launch pipelines and pricing strategies** in the coming quarters, potentially creating **more balanced market conditions** by the second half of 2025.

TOP 7 CITIES

Among the top 7 cities, **NCR** witnessed the **steepest quarterly decline in home sales**, at 11%, dropping to 12,500 units. **MMR**, while remaining the largest market with a 34% share, recorded a **9% quarterly decline**.

Bengaluru demonstrated relatively better resilience with a **7% quarterly decline** to 15,000 units, supported by steady demand from IT-ITeS professionals despite industry layoffs. **Pune** experienced a 10% drop to 16,100 units, affected by excess inventory. **Hyderabad** continued its substantial correction, with sales falling 9% quarter-on-quarter, representing the most severe year-on-year decline (-49%).

Chennai and Kolkata, the smaller residential markets, showed varied performance. **Chennai** demonstrated the strongest resilience with a 4% quarterly decline to 4,050 units, benefiting from **stable pricing and end-user demand**. **Kolkata** recorded a 5% quarterly decrease to 3,900 units, impacted by economic uncertainties but **supported by affordable housing initiatives**.

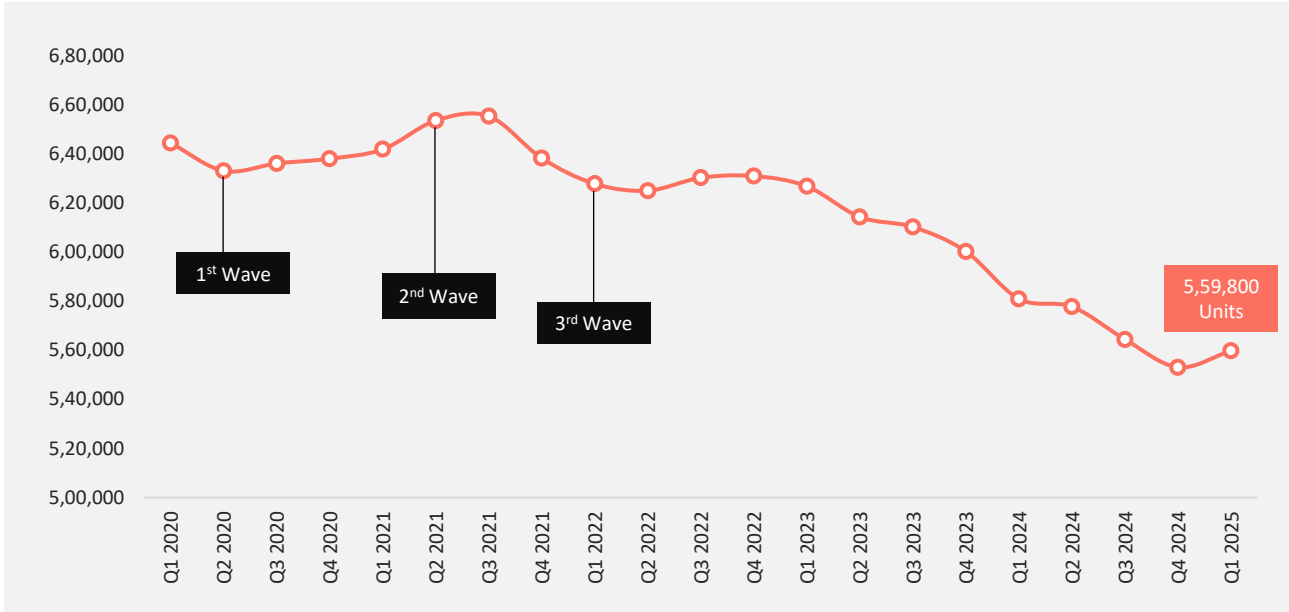
The overall reduction in housing sales reflects broader economic challenges, including inflationary pressures and cautious buyer sentiment.

City	Q1-2025	Q4-2024	Q1-2024	Q-o-Q	Y-o-Y
NCR	12,500	14,100	15,650	-11%	-20%
MMR	31,600	34,700	42,900	-9%	-26%
Bengaluru	15,000	16,100	17,800	-7%	-16%
Pune	16,100	17,900	23,000	-10%	-30%
Hyderabad	10,100	11,100	19,700	-9%	-49%
Chennai	4,050	4,200	5,500	-4%	-26%
Kolkata	3,900	4,100	5,650	-5%	-30%



Available Inventory Trend

Q1 2025 | Pan-India



- 1 Q1 2025 has witnessed a continuation of the **declining trend in available housing inventory** across India's seven cities, signaling **robust market health** despite new launches exceeding 100,000 units. As of the current quarter's end, the available inventory stood at 5,59,800 units, reflecting a **marginal 1% quarterly increase** but a notable **4% year-on-year reduction**.
- 2 The **shrinking inventory levels depict strengthening residential market fundamentals**, driven by several positive macroeconomic factors. The **growing economy and rising disposable incomes** have bolstered consumer confidence in property investments, while **ongoing urbanization continues to fuel housing demand** in the top seven cities.

TOP 7 CITIES

Delving into city-specific trends, **Bengaluru**, with 10% of the total available inventory across the top 7 cities, **emerged as the only city with an 11% quarterly increase and 28% year-on-year available inventory growth**. This indicates supply-demand imbalances despite the city's substantial IT-ITeS sector employment. **Kolkata**, representing 5% of the Pan India inventory share, witnessed the **second-highest quarterly increase at 6%**, though it still shows a **4% decline year-on-year, reflecting a gradual market recovery**.

Chennai and Pune experienced modest quarterly inventory increases of 2% and 1%, respectively. However, **Pune's 16% year-on-year reduction in available units signals strong absorption** in this city, which represents a 15% share of total available inventory across the top 7 cities.

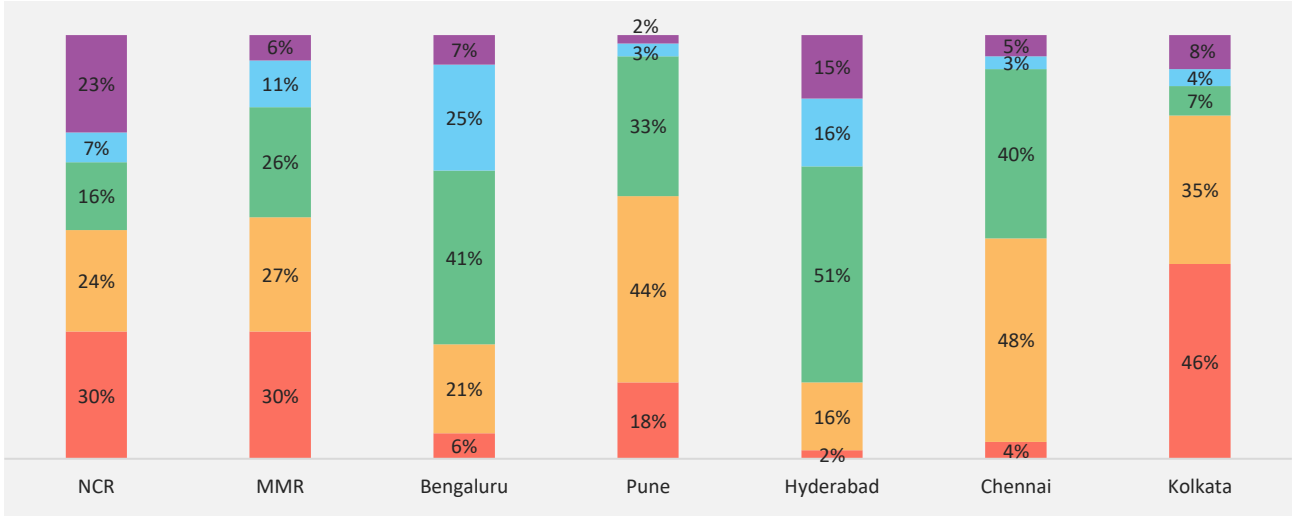
NCR showed encouraging signs with a 2% quarterly inventory reduction and similar annual improvement, demonstrating steady demand despite comprising 15% of total inventory. **MMR**, which dominates with 32% of the Pan India available inventory share, maintained **stable inventory levels quarter-on-quarter** with an impressive **7% year-on-year reduction**. Similarly, **Hyderabad** (17% share) displayed **quarter-on-quarter stability with a moderate 3% annual inventory contraction**, suggesting balanced supply-demand dynamics.

City	Q1-2025	Q4-2024	Q1-2024	Q-o-Q	Y-o-Y
NCR	84,500	85,900	86,400	-2%	-2%
MMR	1,80,100	1,81,000	1,92,700	Nil	-7%
Bengaluru	58,700	52,800	45,800	11%	28%
Pune	81,400	80,700	97,000	1%	-16%
Hyderabad	97,950	97,800	1,01,300	Nil	-3%
Chennai	29,100	28,400	28,500	2%	2%
Kolkata	28,050	26,500	29,300	6%	-4%



Available Inventory Trend

Q1 2025 | Pan-India by Budget Segmentation



- 1 The residential markets across India's seven cities demonstrate a clear **predominance of high-end housing inventory**, representing approximately **31% of the total available inventory**. This is followed by the **mid-end and affordable segments, at 28% and 20%**, respectively. The **luxury and ultra-luxury categories** represent smaller but significant shares, **at 11% and 10%** of the available inventory, respectively.
- 2 When examining the **distribution of available inventory across price brackets**, **MMR** emerges as the city with the **highest volume of available units in the affordable, mid, and luxury segments**. In contrast, **Hyderabad** maintains its position at the forefront of the **high-end segment**. **NCR's substantial concentration in the ultra-luxury segment** presents potential market challenges, suggesting a possible oversupply situation given the many high-value properties available.
- 3 Furthermore, a **city-wide assessment of the available inventory** reveals distinctive patterns. **NCR, MMR, and Kolkata** show the greatest concentration of **affordable housing units**, while **Pune and Chennai** lead in the **mid-end** segment. **Bengaluru and Hyderabad** distinguish themselves with the most significant proportion of **high-end** residential offerings among their available inventory.

Budget Segmentation:

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

CAPITAL VALUES & INVENTORY OVERHANG

City	Avg. Base Selling Price (INR/sf)	Q-o-Q (%)	Y-o-Y (%)	Inventory Overhang*	Q-o-Q Change	Y-o-Y Change
NCR	8,330	10%	34%	17	Nil	5%
MMR	16,900	2%	16%	15	7%	5%
Bengaluru	8,650	3%	20%	11	10%	32%
Pune	7,800	1%	10%	13	8%	Nil
Hyderabad	7,550	3%	19%	24	20%	33%
Chennai	6,900	2%	11%	20	11%	24%
Kolkata	5,950	2%	12%	20	18%	28%

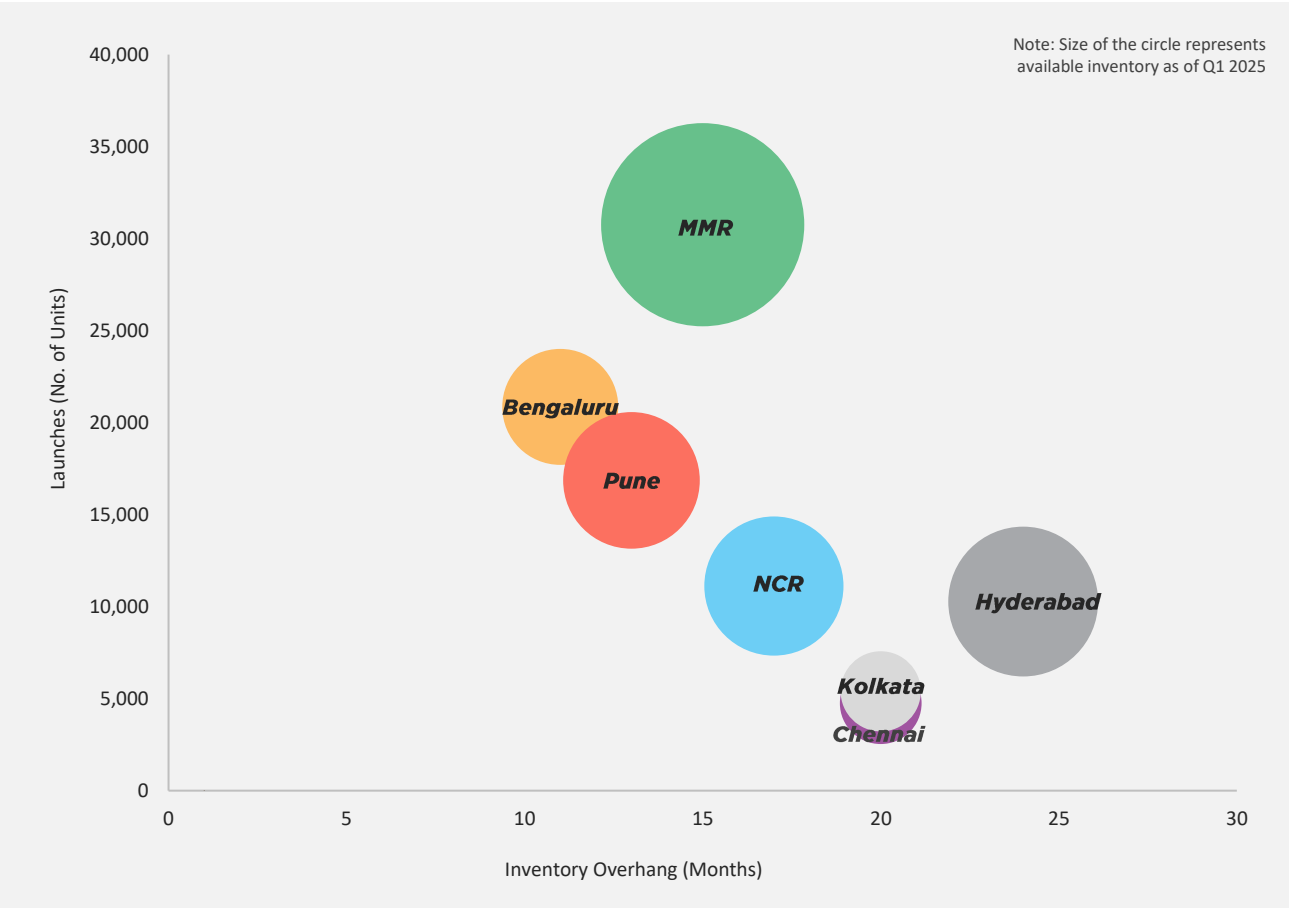
Average price in INR/sf as quoted on BSP on BUA

*In months

- 1 Driven by **increased luxury, ultra-luxury supply, and robust housing demand**, average residential prices in India's top seven cities saw significant appreciation, ranging from 10-34% year-on-year in Q1 2025. At the pan India level, an **annual growth of 17%** was recorded – from INR 7,550/sqft in Q1 2024 to **INR 8,868/sqft in Q1 2025**. Among the top 7 cities, **NCR and Bengaluru recorded the highest annual price jump of over 34% and 20%**, respectively.
- 2 By the end of Q1 2025, the top 7 cities experienced an increase in inventory overhang both quarterly and annually. **Quarter-over-quarter, six cities saw their inventory overhang rise by 1 to 4 months**, with the National Capital Region (NCR) being the only market to maintain stability. A similar trend is observed **annually**, where six cities recorded inventory overhang increases **ranging from 1 to 6 months**, while Pune's inventory absorption timeline remained stable.

Inventory Overhang v/s New Launch Supply v/s Available Inventory

Q1 2025 | Pan-India



- 1 The **inventory overhang** across India's seven cities has **increased in Q1 2025** compared to Q4 2024, **rising from 14 to 16 months on average**. **Hyderabad leads** with the highest inventory overhang **at 24 months** – an increase of 4 months quarter-on-quarter. **Bengaluru** maintains its position with the **lowest overhang at 11 months** despite a QoQ increase by 1 month, reflecting relatively healthier demand-supply dynamics despite adding 20,850 new units in Q1 2025.
- 2 The **elevated available inventory levels in Hyderabad** result primarily from aggressive previous launch cycles and buyers' price sensitivity. MMR presents a concerning scenario with the **highest available inventory** and an **increase in its overhang by one month** compared to both Q1 2024 and Q4 2024.
- 3 **NCR and Pune** show moderate inventory positions, with 17 and 13 months, respectively. **Chennai and Kolkata** both face the **second-highest overhang of 20 months despite the lowest new supply figures**, suggesting developers' caution in these markets with already significant available inventory.



Way Forward

Market recalibration to drive sustainable growth in the residential segment through the remainder of 2025

The Indian residential real estate market is poised for a strategic recalibration in the coming quarters of 2025 following the Q1 moderation. While the market has experienced a significant cooling effect, with sales declining year-on-year, several fundamental factors suggest stabilization rather than further deterioration in the months ahead.

The current correction appears cyclical rather than structural, with strong economic fundamentals supporting a recovery trajectory. India's projected GDP growth remains among the highest globally, and inflation continues to be well-controlled, providing a stable macroeconomic environment for real estate growth. The temporary sales deceleration can be attributed mainly to price resistance after the substantial 17% annual appreciation rather than deteriorating demand drivers.

Supply-side dynamics reveal developer confidence in the market's absorption capacity. Despite the sales slowdown, new launches remained robust. The strategic shift toward high-end and luxury segments demonstrates developers' measured approach to navigating current market conditions while maximizing value creation. This strategic rebalancing toward mid-segment housing may emerge as developers respond to evolving market dynamics and broaden their customer base.

As affordability concerns stabilize with likely price normalization in coming quarters, fence-sitting buyers expect to re-enter the market. The Reserve Bank of India's (RBI) reduction of the repo rate by 50 basis points (25 bps in February 2025 and 25 bps in April), bringing it down to 6%, is anticipated to significantly improve home loan affordability and potentially stimulate renewed buyer interest across price segments.

Institutional investment in Indian real estate remains robust, with foreign investors maintaining a strong interest in the market's long-term growth story. The continued capital inflow will support project completions and new development, providing buyers with more options across price segments.

The increasing formalization of the sector, enhanced transparency through RERA implementation, and favorable government policies will continue to strengthen buyer confidence. These structural improvements, coupled with India's strong demographic dividend and rising urbanization, establish a solid foundation for sustained growth in the residential segment through the remainder of 2025 and beyond.



- 1 Fractional ownership platforms expanding rapidly** allowing smaller investors to participate in premium residential assets through regulated digital platforms
- 2 Tier-2 and Tier-3 cities gaining significant traction** as remote work continues to normalize and infrastructure improvements facilitate lifestyle migration
- 3 Rental yields experiencing upward pressure** due to persistent gap between housing demand and supply in major employment hubs
- 4 Transit-oriented development gaining premium status** with properties near metro corridors and transportation hubs commanding higher valuations
- 5 Integrated township developments outperforming standalone properties** as buyers prioritize comprehensive infrastructure and community amenities over location centrality

ANAROCK

VALUES OVER VALUE

ANAROCK is a leading independent real estate services company with a presence across India and the Middle East. The Company has diversified interests across the real estate value chain and deploys its proprietary technology platform to accelerate marketing and sales across its businesses. Over the last seven years, the firm has grown from being a residential-focused organization to other businesses including Retail, Commercial, Technology, Investment Banking, Hospitality, Land, Industrial and Logistics & Data Centres, Research, Strategic Advisory & Valuations, Flexible spaces, and Society Management.

Founded in 2017 by industry leaders Anuj Puri and Rohin Shah, ANAROCK was built on a forward-looking vision of the real estate sector. With deep insights into the dynamics of the Indian real estate market, Anuj and Rohin anticipated the industry's growth potential and established ANAROCK to deliver integrated solutions across multiple real estate segments.

ANAROCK operates in over 15 business verticals, marking its presence across all segments of the real estate value chain. With a team of over 2200 certified and experienced real estate professionals who operate across all major Indian and Middle East markets, the Company has also leveraged technological advancements and deployed bespoke tools across its business lines, offering a comprehensive suite of Real Estate solutions to all its customers.

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