

DUNA HOUSE BAROMETER

The latest property market info
from Duna House network

Issue 157
July 2024



DHS
BÉT

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MARKET**

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the Budapest Stock Exchange

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FORTHCOMING ISSUES

DATE OF ISSUE	CONTENT
12.09.2024	August 2024 data
14.10.2024	Q3 2024 data (including price indices and housing loan data)
12.11.2024	October 2024 data

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GENERAL INFORMATION CONCERNING THE CONTENT OF THE PRESENT PUBLICATION

Attention! The present publication must not serve as grounds for estimating, or making conclusions in relation of Duna House business profitability.

All data, information, estimates and professional statements presented in the publication are developed based on data gained from the activities of Duna House Holding members, or in some cases are based on subjective experience. Application of those for the entire Hungarian property market may require additional corrections.

Data sources – unless indicated differently at the given section – derive from the database operated by Duna House Holding, the content of which is compiled by members of the network upon their individual judgement and information gained from clients. The operator does not take responsibility for the comprehensiveness of the data. Data presented in the present publication is mainly based on parameters of property transactions in major Hungarian cities given by Duna House branch offices and agents.



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EXECUTIVE SUMMARY

REAL ESTATE MARKET CLOSED JULY WITH RECORD SALES AND SUMMERY DEMAND

The summer break in the property market was shorter than usual. After the slowdown in June, the 11,538 transactions estimated by Duna House for July meant that the real estate market closed the strongest month of the year so far. The July results show that the segment performed 23.7% better than in the previous month and 88.9% better than in the same period last year. Summer had not had an impact on transaction numbers, but it did impact the number of new buyers registered in July. In line with the trends of previous years, demand for real estate was easing again in July, but we still saw the strongest July of the past two years.

In contrast to the housing market, the domestic mortgage market has been undergoing a more noticeable easing in the summer. According to data from Credipass, the international financial brand of the Duna House Group in Hungary, HUF 115 billion in contracted residential mortgage loans were taken out in July 2024. Compared to the June estimate of MNB, the National Bank of Hungary, market activity was down by 10%, but the data still shows a significant increase of 129% compared to the same period last year. The slight downward trend is also reflected in the number of loan applications submitted, which is expected to lead to a decline in the volume of loans disbursed in the coming months.

Both in the country and in urban areas, the average price per sq. m. of the fastest-selling property type, i.e. concrete block units increased, according to the July 2024 data of Duna House. In the Eastern part of the country, buyers can expect an average price of HUF 573,000 per sq. m., while in the West the average price per sq. m. is HUF 550,000. On the Buda side of the capital the price has increased to HUF 930,000 and in Pest to HUF 820,000. In the country, the owners of concrete block apartments eased the asking price by 2-4%, leaving 4-5% room for further buyer bargaining. There was no change in the asking price in Buda, but we saw 2% reductions in Pest. On the Buda side, only 1% buyer bargaining was possible, while on the Pest side buyers had a 3% margin over the asking price.

Prices of brick and mortar homes in the country also showed a significant increase compared to the same period last year, with an average of HUF 374,000 per sq. m. in the East and HUF 466,000 per sq. m. in the West. In the capital, however, brick and mortar sales fell everywhere except in the Buda districts. While a year ago more than half of the apartments in Buda were sold for between HUF 600-900,000 per sq. m., this July the price range between HUF 1.2-1.4 million dominated with a share of 28%. In Buda, the change was also significant in terms of property value: in July last year, 39% of buyers preferred homes between HUF 50-60 million, while in July 2024 the same proportion of buyers opted for properties with a purchase price north of HUF 70 million.

Demand in the domestic real estate market preferred properties in good condition nationwide. The share of homes in need of renovation was equally 8% in the capital and in Western Hungary, while in the East and in County Pest buyers opted for a home to be renovated in an equal 9% of transactions.

Investment was the motivation for 32% of those buying a home in the capital, and the proportion of customers acquiring their first home was the same as last year. On average, HUF 66.4 million was spent on a property investment and HUF 46.5 million on a first home. According to the data of sales concluded in the country with the assistance of Duna House, buyers were motivated to purchase residential property mainly as an investment (29%), while more than a quarter of them signed a contract for a larger home. The share of first-time home buyers fell from 28% last year to 19% in July 2024. Investors spent HUF 31.9 million, buyers moving into a larger property spent HUF 55.1 million and first-time home buyers spent HUF 37.6 million.

In the capital, the main reasons for selling were moving into a larger property (29%) and cashing in on a previous investment (27%), while in the country the most common motivation with a 24% share was parting with a property investment.

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THREE INTERESTING FACTS

The real estate market closed its strongest month of the year so far in July with 11,538 transactions.

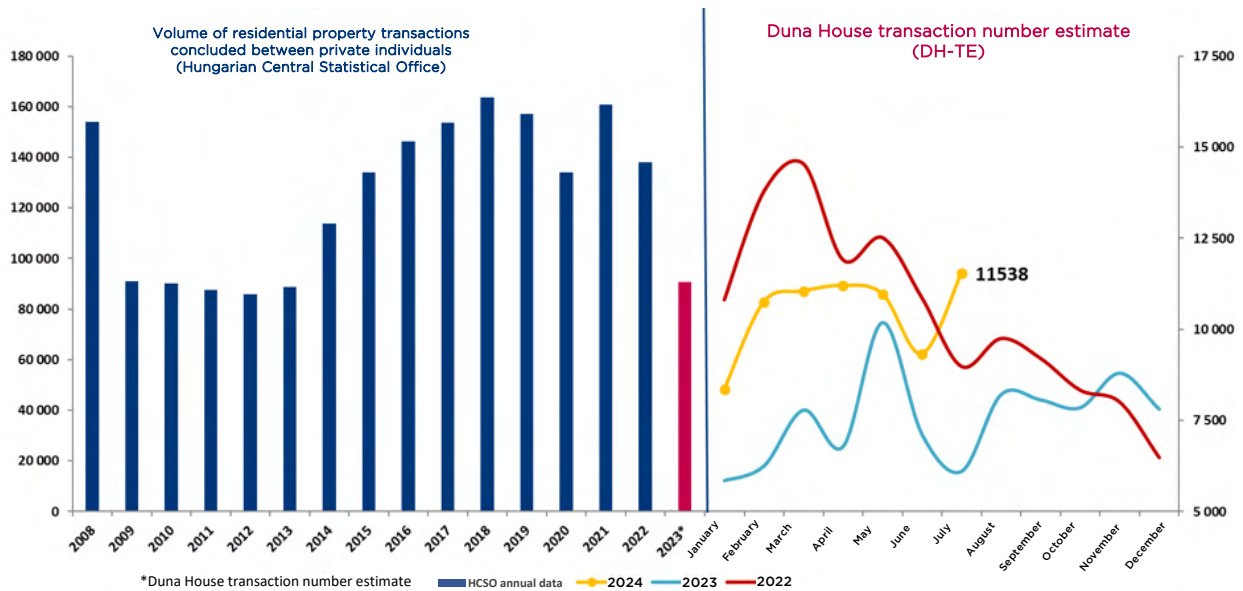
Compared to the same period in the last two years, demand for real estate in July 2024 was stronger.

Last year in July, buyers in Buda were more likely to purchase homes between HUF 50-60 million, while this year they preferred homes worth north of HUF 70 million.

TRANSACTION DATA

DUNA HOUSE TRANSACTION NUMBER ESTIMATE (DH-TE)

The Duna House Group presents its monthly Transaction Number Estimate (DH-TE) and Mortgage Forecast below, showing that 11,538 residential property transactions were concluded in July 2024 and residential mortgage contracts worth HUF 115 billion were signed in the whole of Hungary.



The summer break in the property market was shorter than usual. After the slowdown in June, the 11,538 transactions estimated by Duna House for July meant that the real estate market closed the strongest month of the year so far and even surpassed the record of April 2024 by 3%. The July results show that the segment performed 23.7% better than in the previous month and 88.9% better than in the same period last year.

In contrast to the housing market, the domestic mortgage market has been undergoing a more noticeable easing in the summer. According to data from Credipass, the international financial brand of the Duna House Group in Hungary, HUF 115 billion in contracted residential mortgage loans were taken out in July 2024. Compared to the June estimate of MNB, the National Bank of Hungary, market activity was down by 10%, but the data still shows a significant increase of 129% compared to the same period last year. The slight downward trend is also reflected in the number of loan applications submitted, which is expected to lead to a decline in the volume of loans disbursed in the coming months.

THE TABLE BELOW SHOWS MONTHLY TRANSACTION VOLUME ESTIMATES OF DUNA HOUSE.

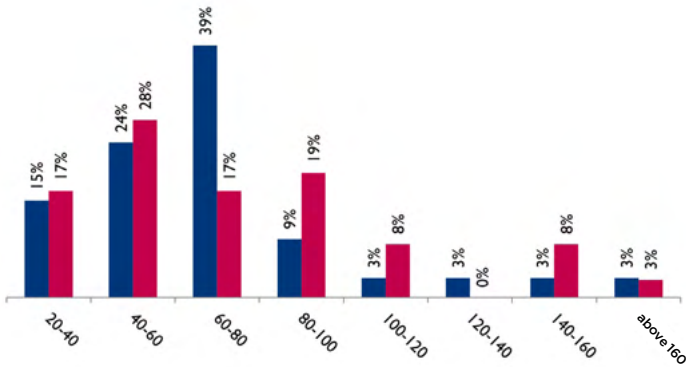
	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
2021	11 185	14 569	15 630	13 511	14 198	13 615	11 185	11 304	11 807	11 526	11 022	11 422
2022	10 815	13 793	14 548	11 911	12 519	10 859	8 978	9 748	9 200	8 326	8 000	6 474
2023	5 853	6 253	7 787	6 787	10 187	7 120	6 107	8 213	8 067	7 853	8 800	7 813
2024	8 354	10 754	11 046	11 200	10 969	9 323	11 538					

Methodology behind DH-TE: Regardless of the time of year, the most important indicator of the real estate market is the annual number of sale transactions. The DH-TE figure is an estimate published by Duna House and it reflects interim approximate data. The estimate is based on the number of monthly property transactions brokered by Duna House and the estimated market share of Duna House. The estimate of the current monthly market share of Duna House is based on the following indicators: 1. Data published by the Hungarian Central Statistical Office on transactions among private individuals. Since the Statistical Office publishes data with several months' delay, market share can be adjusted retroactively which also results in a more accurate estimate as well. **Please note:** After 2016 and as a consequence of the boom in newly-built apartments, pre-contracted purchase transactions appear in the statistics of the Statistical Office with a delay of several months or even one or two years, after the capital transfer tax has been levied, which results in anomalies in the statistics. 2. The number of Energy Certificates issued; 3. Subjective assessment based on other management information from Duna House Holding. **Please also note** that DH-TE data cannot be used for defining the volume of transactions brokered by Duna House, or for estimating the business profit of Duna House Holding or for the drawing of any related conclusions. **Mortgage forecast:** Figures published Credipass can primarily be used for quick trend forecasts; the National Bank of Hungary publishes the actual figures for the second last month at the beginning of each month.

TRANSACTION PARAMETERS IN BUDAPEST

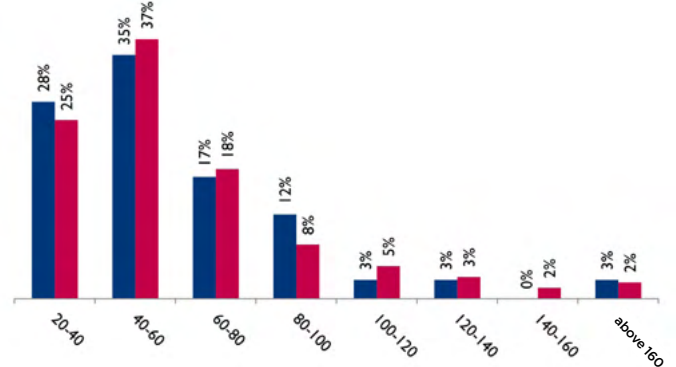
According to sales data released by Duna House last month, demand on the Buda side was strong mainly for apartments of 40-60 sq. m., with 28% of all new properties falling into this category. While a year ago, more than half of the apartments in Buda were sold for HUF 600-900 thousand per sq. m., this July the HUF 1.2-1.4 million price bracket dominated with a share of 28%. There was also a significant change in terms of property value: last July 39% of buyers preferred to buy homes worth between HUF 50-60 million, while in July 2024 the same proportion of Duna House clients chose properties with a purchase price exceeding HUF 70 million. Among the transactions on the Pest side, the share of properties between 40-60 sq. m. was the largest, too, with 37%. The majority of properties sold for between HUF 600-800,000 per sq. m. and the most common property value was above HUF 70 million in Pest, too.

BUDA

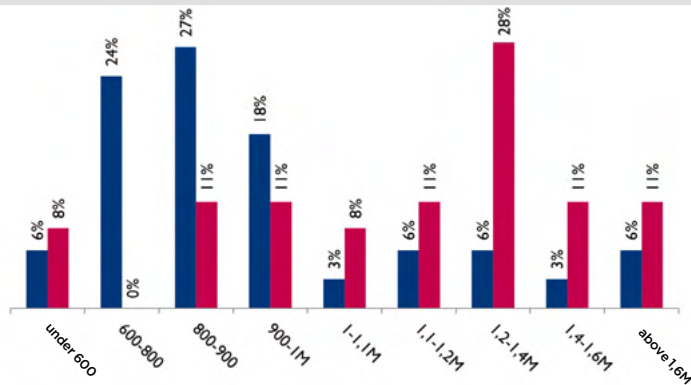


apartment size (m²)

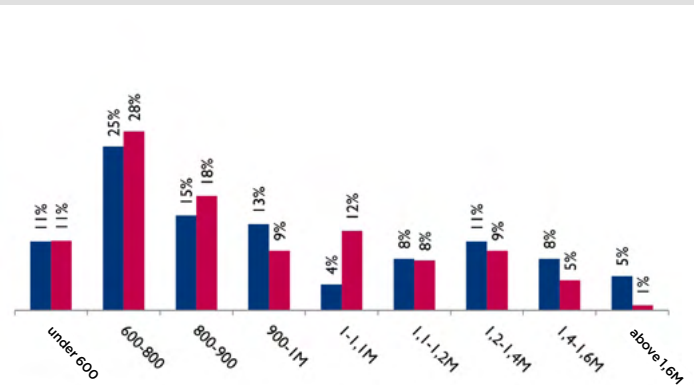
PEST



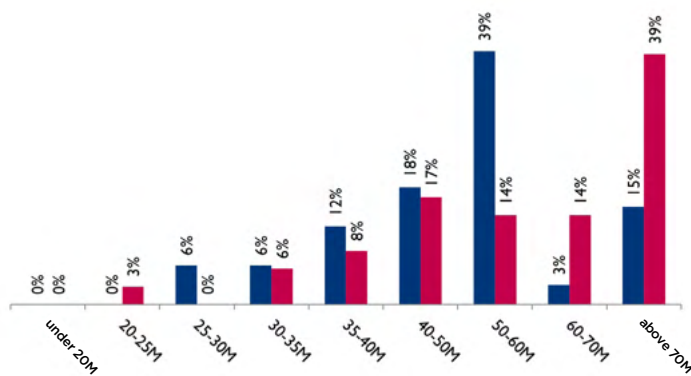
apartment size (m²)



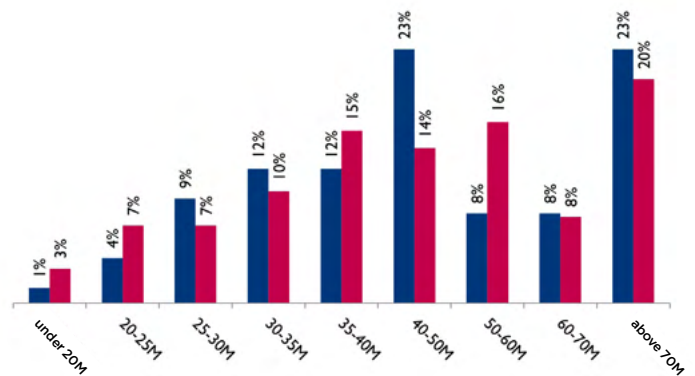
sq. m. price (in thousand HUF)



sq. m. price (in thousand HUF)



apartment price (in million HUF)



apartment price (in million HUF)

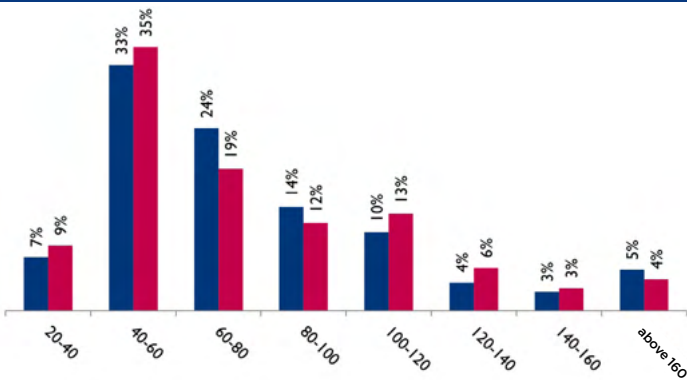
■ July 2023 ■ July 2024

Based on properties sold by Duna House Franchise Network.

TRANSACTION PARAMETERS IN THE COUNTRY

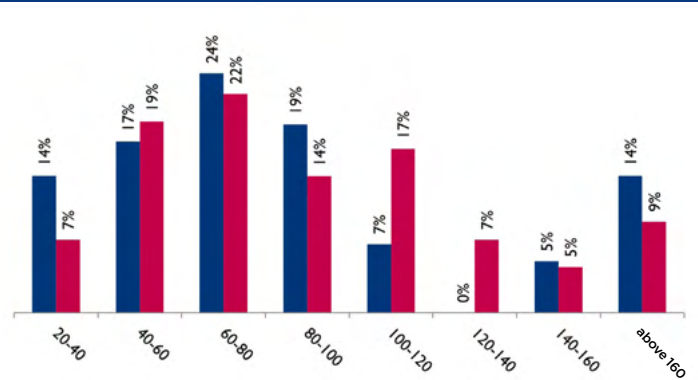
With the exception of Central Hungary, demand was strongest for properties between 40-60 sq. m. (35%) in the entire country. Only 18% of sales were concluded at a price of HUF 250,000 per sq. m., with most (28%) of the properties sold being in the price category above HUF 600,000 per sq. m., at the other end of the scale. In terms of property value, the bracket above HUF 40 million dominated with a 30% majority. In County Pest, according to Duna House sales data, 22% of homes sold in July 2024 had a floor space of 60-80 sq. m., while 19% were in the 40-60 sq. m. category. In terms of price per sq. m., almost half (45%) of all sales fell in the 'HUF 600,000 and above' category. The share of homes sold in County Pest with a price tag north of HUF 50 million increased by 8 percentage points compared to last year.

COUNTRYWIDE (EXCLUDING CENTRAL HUNGARY)



apartment size (m²)

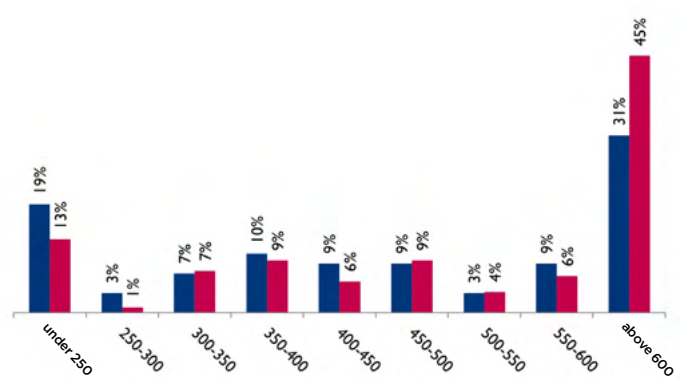
COUNTY PEST



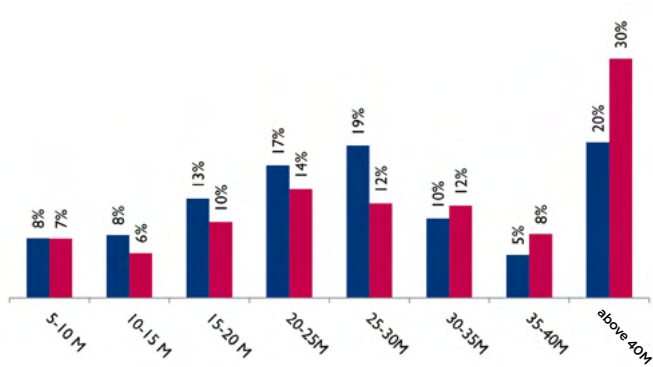
apartment size (m²)



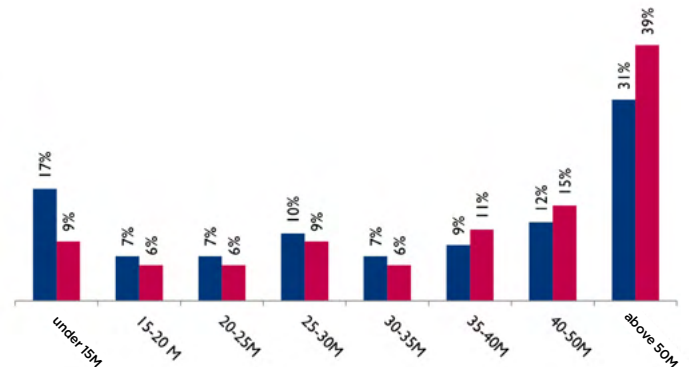
sq. m. price (in thousand HUF)



sq. m. price (in thousand HUF)



apartment price (in million HUF)



apartment price (in million HUF)

■ July 2023 ■ July 2024

Based on properties sold by Duna House Franchise Network.

SALES DATA - PRICES - BARGAINING MARGINS

The average price per sq. m. of concrete block apartments increased in both rural and urban areas, according to data published by Duna House for July 2024. In the Eastern part of the country, buyers could expect an average price per sq. m. of HUF 573,000, while in the Western parts it was HUF 550,000, accompanied by a 4% change in the asking price and a 4% buyer bargain. In the West, owners reduced their asking price by half as much, but they left more room (5%) for bargaining. Brick and mortar properties also saw a significant increase in prices compared to the same period last year, with an average of HUF 374,000 per sq. m. in the East and HUF 466,000 in the West. Owners reduced the advertised price by 4-6% during the sales process and also left a 6-8% margin for buyer bargain.

PANEL: COUNTRYWIDE

	EAST				WEST			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
July 2023	23 750 000	476 000	2%	8%	27 367 000	503 000	7%	5%
July 2024	31 005 000	573 000	4%	4%	27 902 000	550 000	2%	5%

BRICK: COUNTRYWIDE

	EAST				WEST			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
July 2023	26 887 000	306 000	6%	7%	29 423 000	358 000	4%	6%
July 2024	32 067 000	374 000	6%	8%	37 571 000	466 000	4%	6%

The price of concrete block units in the capital also increased, with prices in Buda rising to HUF 930,000 and in Pest to HUF 820,000 in July this year. There was no change in the asking price on the Buda side, while on the Pest side saw some changes in 2% of all transactions. On the Buda side, buyers had a 1% bargaining margin, while on the Pest side, buyers could shave off 3% from the asking price. This July, the average price per sq. m. of brick and mortar apartments fell everywhere apart from the districts of Buda. In Buda, owners softened their asking price by 2%, while in Pest and in the city centre by 4%. Buyers' bargain in the Buda districts was 7%, while sellers in the downtown districts and other areas of Pest conceded 4-5% in the transactions concluded in July 2024.

PANEL: BUDAPEST

	EAST				WEST			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
July 2023	44 775 000	777 000	3%	4%	34 196 000	735 000	9%	3%
July 2024	40 900 000	930 000	0%	1%	38 600 000	820 000	2%	3%

BRICK: BUDAPEST

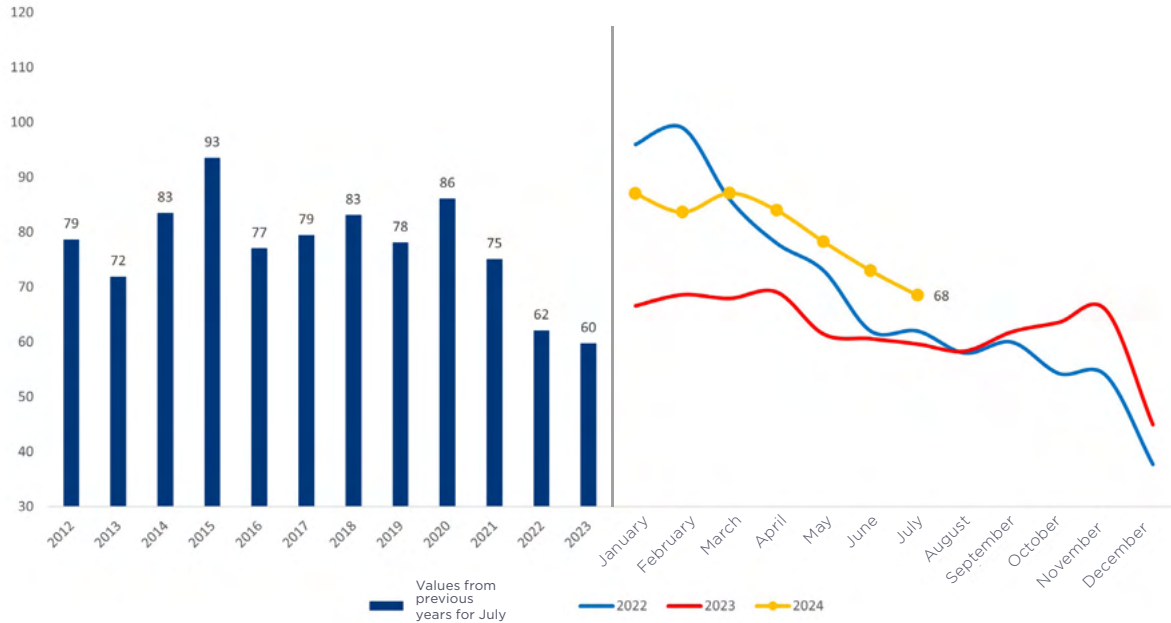
	BUDA				PEST				INNER CITY			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
July 2023	73 466 000	1008 000	11%	4%	50 427 000	856 000	5%	9%	89 148 000	1163 000	6%	5%
July 2024	88 630 000	1135 000	2%	7%	48 975 000	781 000	4%	5%	75 041 000	1125 000	4%	4%

Based on purchase prices of the given period of properties brokered by Duna House.

Methodology: Change in the listing price is the difference between the first price indicated by the seller in the Duna House assignment and the last registered price at the time of the appearance of the buyer. Bargain shows additional changes in the price agreed upon by the seller and buyer. The two indicators together give a good picture of the difference in price between the original idea of the seller and the actual final price.

BUYERS - DEMAND INDEX

Not in terms of transaction numbers, but the summer is having an impact on the number of new buyers registered in July. In line with the trends of previous years, demand for residential real estate in Hungary ebbed in July this year. The Duna House Demand Index currently stands at 68 points, which is still the strongest July reading in the last two years.



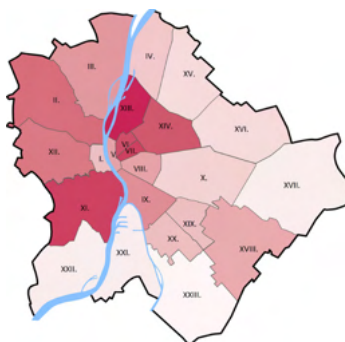
Methodology behind Demand Index: The basis of the estimate is the activity registered by our agents in various, mainly major cities and Duna House offices. Corrections are made depending on the number of active agents and working days. The Demand Index is an important indication of buyer side's reactions to political decision or solutions offered by the financial sector. Demand Index is a quantitative indicator which has no direct connection with the realized or future transaction numbers. The latter is a qualitative issue highly affected by market environment and available financial product.

DEMAND FOR INDIVIDUAL DISTRICTS

District 13 (Angyalföld) could retain the title of the most sought-after district of the capital this July, too, with 18% of property buyers indicating District 13 as their preferred area, according to a survey by Duna House. Second place went to District 7 (Erzsébetváros), also popular with investors, while District 11 (Újbuda), another district frequented by those looking for new-built housing, came in third.

DISTRICT	JULY 2023	JULY 2024
Bp. 01.	8,7%	8,3%
Bp. 02.	14,9%	13,9%
Bp. 03.	12,6%	11,4%
Bp. 04.	7,4%	7,4%
Bp. 05.	11,1%	10,8%
Bp. 06.	16,3%	16,6%
Bp. 07.	16,5%	17,3%
Bp. 08.	10,9%	10,7%
Bp. 09.	13,9%	11,7%
Bp. 10.	6,0%	7,1%
Bp. 11.	16,1%	17,0%
Bp. 12.	12,2%	13,2%
Bp. 13.	16,8%	18,0%
Bp. 14.	14,7%	15,5%
Bp. 15.	6,5%	5,9%
Bp. 16.	6,0%	6,1%
Bp. 17.	4,4%	4,9%
Bp. 18.	9,1%	9,8%
Bp. 19.	8,0%	8,5%
Bp. 20.	6,4%	8,1%
Bp. 21.	4,3%	4,5%
Bp. 22.	4,0%	4,9%
Bp. 23.	2,7%	2,9%

INTEREST TOWARD THE DISTRICTS IN BUDAPEST:

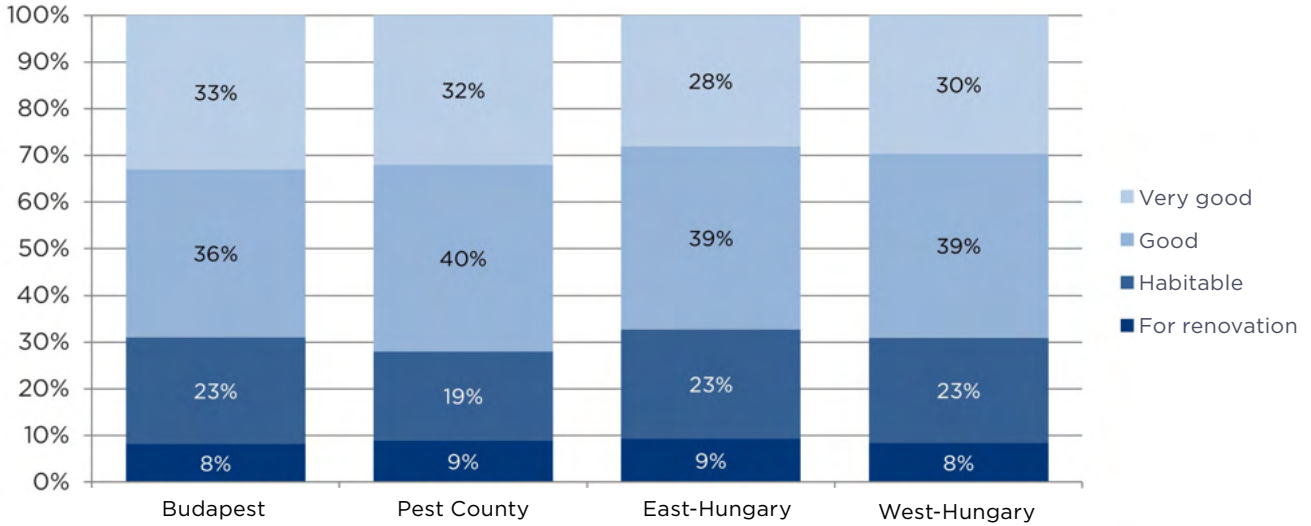


Methodology: Our clients with a purchase intention indicate their preferred districts (more at the same time) when meeting our agents. The above preference map is put together based on this "popularity information".

Data is analysed based on real estate transactions brokered by Duna House. The territorial distribution of DH transactions may differ from the territorial distribution of the market as a whole. Duna House Holding pursues its real estate agency activities mainly in Budapest and in major cities. Duna House Holding does not make corrections in view of the differences in territorial distribution between its own transactions and of the market in general.

QUALITY PREFERENCES

According to the July 2024 sales data published by Duna House, demand in the domestic residential real estate market was nationally oriented towards properties in good condition, with the second most popular condition being the 'in very good repair' category. The proportion of homes to be renovated was 8% both in the capital and in Western Hungary, while in 8% of transactions buyers opted for buying a home to be renovated both in the East and in County Pest.



TURNOVER SPEED (TIME NEEDED TO SELL)

According to Duna House's July data, concrete block housing continued to be the fastest selling residential property type. In the country, they needed an average of just over 3 months to sell, while in the capital they took less than 3 months to find a new owner. Brick and mortar flats and houses took around 4 months on average to sell in Budapest, while in the country the turnaround was slower, with an average of 4.5 months needed for a successful sale.

PANEL				
TIME NEED OF SALE (DAY)				
	EAST	WEST	BUDA	PEST
July 2023	75	89	83	92
July 2024	88	104	96	80

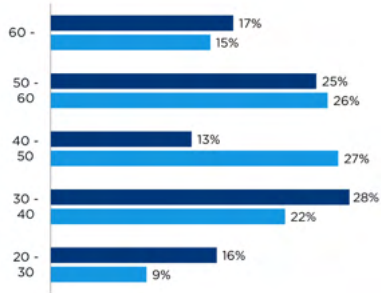
BRICK					
TIME NEED OF SALE (DAY)					
	EAST	WEST	BUDA	PEST	INNER CITY
July 2023	155	127	116	111	136
July 2024	138	134	132	121	119

Data is assessed based on real estate sold by Duna House. Territorial distribution of transactions brokered by Duna House may differ from the territorial distribution of the market in whole. Duna House Holding carries out its real estate agency activities mainly in Budapest and major cities. Duna House Holding does not make corrections in relation of the territorial distribution of own and market transactions.

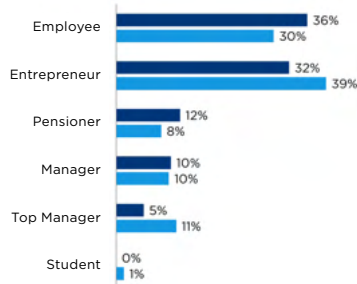
BUYER PROFILE IN BUDAPEST

According to Duna House data, 28% of those buying residential property in the capital belonged to the 30-40 age group in July this year, but the 50-60 age group also had a significant share of 25%. 36% of buyers in Budapest worked as employees, and nearly a third were self-employed. Investment was the motivation for 32% of buyers in the capital, and the same proportion of clients as last year acquired their first home. On average, clients spent HUF 66.4 million on a residential property investment and HUF 46.5 million on a first home.

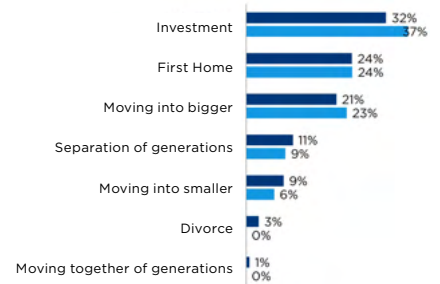
BUYERS' AGE IN BUDAPEST



BUYERS' STATUS IN BUDAPEST



MOTIVATION IN BUDAPEST



AGE	AVERAGE PRICE	m ²
20 - 30	44 185 000	54
30 - 40	62 043 000	70
40 - 50	75 318 000	66
50 - 60	53 910 000	64
60 -	73 245 000	65

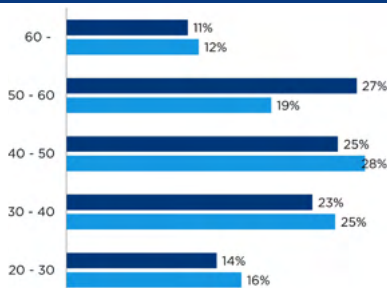
STATUS	AVERAGE PRICE	m ²
Employee	49 471 000	53
Top Manager	98 000 000	100
Manager	62 942 000	68
Pensioner	47 522 000	58
Student	52 300 000	54
Entrepreneur	83 874 000	79

SITUATION	AVERAGE PRICE	m ²
Investment	66 451 000	60
First Home	46 534 000	57
Separation of generations	42 727 000	50
Moving together of generations	57 000 000	83
Moving into smaller	87 767 000	75
Moving into bigger	79 734 000	91
Divorce	59 550 000	55

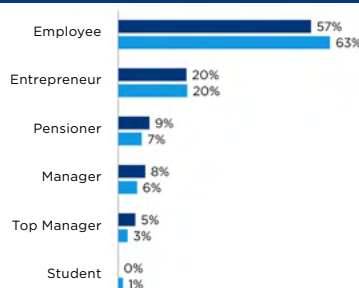
BUYER PROFILE IN THE COUNTRY

According to the data on contracts signed in the country with the assistance of Duna House, the two most active groups of buyers in July this year were those between 50-60 (27%), and 40-50 (25%) years of age. 57% of buyers were employees, with investment (29%) being the main motivation for buyers in the country, and more than a quarter of them were buying a larger home. Investors spent HUF 31.9 million, those moving into a larger home HUF 55.1 million and first-time buyers HUF 37.6 million on home purchases. The share of first-time home buyers fell to 19% from 28% last year.

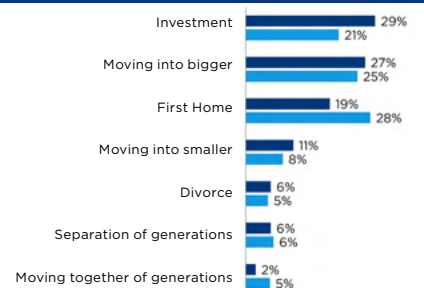
BUYERS' AGE IN THE COUNTRY



BUYERS' STATUS IN THE COUNTRY



MOTIVATION IN THE COUNTRY



AGE	AVERAGE PRICE	m ²
20 - 30	34 815 000	85
30 - 40	43 143 000	94
40 - 50	41 346 000	72
50 - 60	42 359 000	74
60 -	39 749 000	95

STATUS	AVERAGE PRICE	m ²
Employee	34 840 000	77
Top Manager	67 424 000	105
Manager	43 021 000	91
Pensioner	41 588 000	77
Student	69 900 000	52
Entrepreneur	46 619 000	82

SITUATION	AVERAGE PRICE	m ²
Investment	31 918 000	60
First Home	37 694 000	84
Separation of generations	27 502 000	71
Moving together of generations	48 525 000	134
Moving into smaller	33 784 000	72
Moving into bigger	55 163 000	104
Divorce	44 225 000	84

■ July 2023 ■ July 2024

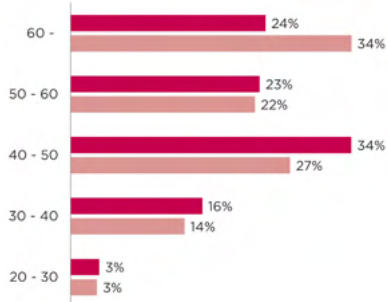
Under our methodology investment as a motivation includes all property transactions that, judged by the buyer's characteristics, can be considered as an investment, i.e. this is not a strictly business category. It includes all family investments and short-term investors who buy a property in a poor state of repair, renovate it and sell it on immediately. These latter buyers have a favourable effect on improving the overall state of repair of the existing pool of properties and are, in view of current construction industry and property market conditions, performing a welcome activity.

Data presented above relating to age, status and reason of purchase have been acquired through voluntary declarations of our clients. Therefore, they qualify as a sample and are regarded as estimates.

SELLER PROFILE IN BUDAPEST

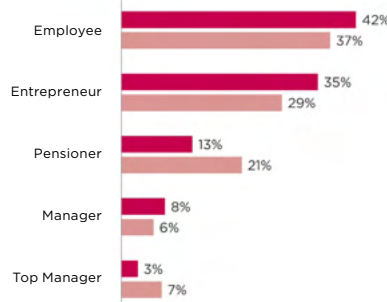
More than a third of owners of residential properties sold in the capital were aged between 40 and 50. 42% of those who sold their homes were employees, and the main reasons for selling were moving into a larger home (29%) and selling a previous investment (27%).

SELLERS' AGE BUDAPEST



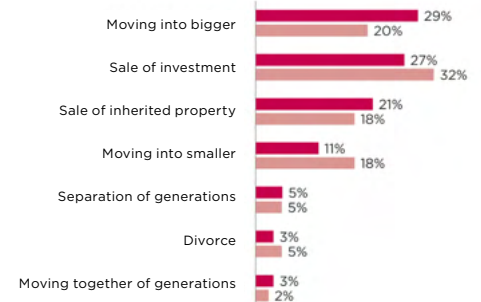
AGE	AVERAGE PRICE	m ²
20 - 30	33 740 000	42
30 - 40	49 741 000	61
40 - 50	63 437 000	69
50 - 60	69 690 000	72
60 -	66 666 000	64

SELLERS' STATUS BUDAPEST



STATUS	AVERAGE PRICE	m ²
Employee	44 079 000	57
Top Manager	101 334 000	112
Manager	58 150 000	73
Pensioner	69 616 000	65
Entrepreneur	83 340 000	70

MOTIVATION BUDAPEST

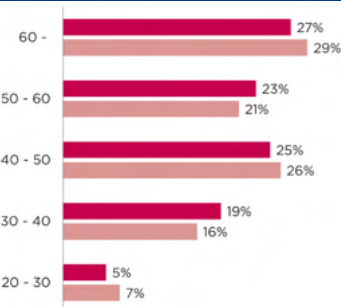


SITUATION	AVERAGE PRICE	m ²
Sale of investment	70 939 000	62
Separation of generations	43 655 000	67
Moving together of generations	86 125 000	96
Moving into smaller	91 812 000	93
Moving into bigger	55 875 000	58
Sale of inherited property	46 491 000	60
Divorce	58 925 000	95

SELLER PROFILE IN THE COUNTRY

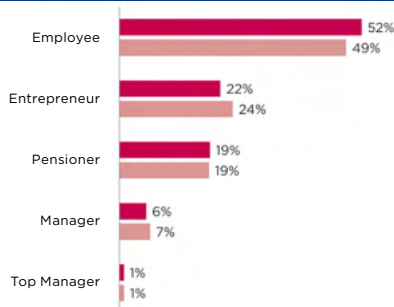
According to Duna House data from July 2024, 27% of sales in the country were made by people aged 60 and over, and 52% of sellers were employees. The two most common motivations for selling, at 24% each, were selling a previous investment and moving into a larger property.

SELLERS' AGE IN THE COUNTRY



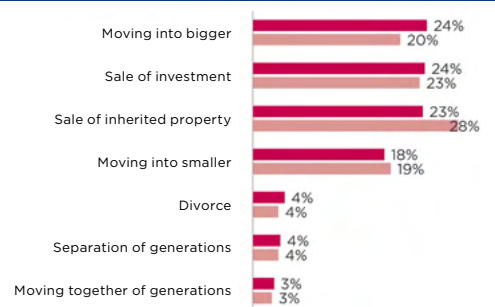
AGE	AVERAGE PRICE	m ²
20 - 30	45 429 000	65
30 - 40	35 363 000	73
40 - 50	46 937 000	93
50 - 60	41 200 000	87
60 -	35 744 000	79

SELLERS' STATUS IN THE COUNTRY



STATUS	AVERAGE PRICE	m ²
Employee	34 757 000	76
Top Manager	69 234 000	68
Manager	54 512 000	94
Pensioner	32 649 000	81
Entrepreneur	59 070 000	98

MOTIVATION IN THE COUNTRY



SITUATION	AVERAGE PRICE	m ²
Sale of investment	38 071 000	75
Separation of generations	50 554 000	90
Moving together of generations	46 479 000	78
Moving into smaller	56 072 000	103
Moving into bigger	44 058 000	80
Sale of inherited property	29 647 000	81
Divorce	42 520 000	82

■ July 2023 ■ July 2024

In seller profile data analysis an updated methodology has been introduced, which partly explains the significant change in the "sale of a property investment" row in recent months.

An overhead photograph of a meeting table. On the left, a person in a grey suit is seated. In the center, a woman in a white blazer is looking at a laptop. On the right, another person in a white blazer is looking at a smartphone. The table is cluttered with papers, a laptop, a tablet, and a ruler. The background is a light-colored carpet.

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