

DUNA HOUSE BAROMETER

The latest property market info
from Duna House network

Issue 173
November 2025



DHS
BÉT

**PRIME
MARKET**

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the Budapest Stock Exchange

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FORTHCOMING ISSUES

DATE OF ISSUE	CONTENT
14.01.2026	Q4 2025 data (with price indices and housing loan data)
12.02.2026	January 2026 data
12.03.2026	February 2026 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

MORTGAGE LENDING AT RECORD HEIGHTS, WHILE SALES SLOWED IN NOVEMBER

There were 9503 sales transactions in November, representing a 17.5% monthly and 15.7% annual decline.

By contrast, the loan market closed a stronger month than ever before: HUF 300 billion in mortgage loans, representing a 53% monthly and 165% annual increase.

The presence of young first-time home buyers continued to grow, while the withdrawal of investors reshaped both demand and supply.

The residential property market presented a mixed picture in November: the number of transactions declined after reaching a peak in September, while the mortgage market broke a historic record. The Otthon Start Program continues to have a decisive impact on the composition of buyers and, more specifically, on the activity of young people looking for their first home. Meanwhile, apartment prices moved in divergent directions on a monthly basis, with moderate corrections in several regions. Turnover times continued to shorten, with concrete block units remaining the fastest-selling residential property type.

Transaction activity: decline after autumn records

According to Duna House estimates, 9503 residential property sales transactions took place in November, which clearly shows that demand has normalized after the exceptionally high figures recorded in September. The number of transactions decreased by 17.5% compared to October and by 15.7% compared to the same period a year earlier. The decline is primarily seasonal, related to the slow decline of the effect of the Otthon Start Program that had characterized previous months.

Credit market: a historic record of HUF 300 billion

The credit market moved in the opposite direction: according to Credipass data, HUF 300 billion worth of mortgage loan agreements were concluded in November, which is 53% higher than in October and 165% higher than in the previous year. The significant increase in demand for loans is clearly attributable to the preferential terms offered by the Otthon Start Program.

Housing prices and price trends: varying monthly movements, stronger bargaining power

November 2025 was characterised by stagnant or slightly rising sq. m. prices nationwide, while actual transaction prices will be falling in many places, with buyers becoming more assertive in their bargaining in both the concrete block and the brick and mortar segments.

Turnover times: accelerating market

Sales times have shortened significantly: concrete block apartments in Budapest sold in an average of 63 days, while their brick and mortar counterparts sold in 3–3.5 months in the country and in 2.5–3 months in Buda and Pest. In most segments, there has been a 20–30-day acceleration compared to the previous year.

Buyers' profile: young people and first-time buyers are gaining ground

Buyer composition clearly shows the continuation of the effects of the Otthon Start Program. In Budapest, the proportion of 20–30-year-olds rose to 22% and first-time buyers to 41%, while the proportion of investment buyers fell to 29%. In the country, 30–40-year-olds dominated, and the proportion of first-time buyers rose from 25% to 43%, while that of investors fell to 19%. The market is thus shifting increasingly towards buyers purchasing for their own use.

Seller's side: the older age group and the sale of investments

Among sellers, those over 60 remain the most active (with a share of approx. 32%). In both the capital and in the country, the sale of homes previously purchased as an investment is the most common motivation, closely followed by the sale of inherited homes. The decline in investor activity is thus clearly noticeable on the seller side, too.

Demand in districts of Budapest, preferences

In November, District 13 continued to lead in terms of buyer interest (with a share of 25.1%), followed by Zugló (District 14) and Erzsébetváros (District 7); Újbuda (District 11) slipped back to sixth place. As far as quality preferences are concerned, buyers were primarily looking for properties in a good condition, while apartments requiring a complete overhaul continued to be most prevalent in Budapest.

Summary

November data paint a picture of a market characterised by more subdued transaction numbers but record loan volumes. The rise of young buyers purchasing their first home is noticeably transforming the structure of demand, while the retreat of investors is also leaving its mark on the supply side. Housing prices diverged on a monthly basis, and sales times have continued to shorten, indicating a fundamentally stable but structurally changing market as we enter 2026. The pace of price increase is expected to moderate to a range between 0 and 10 percent.

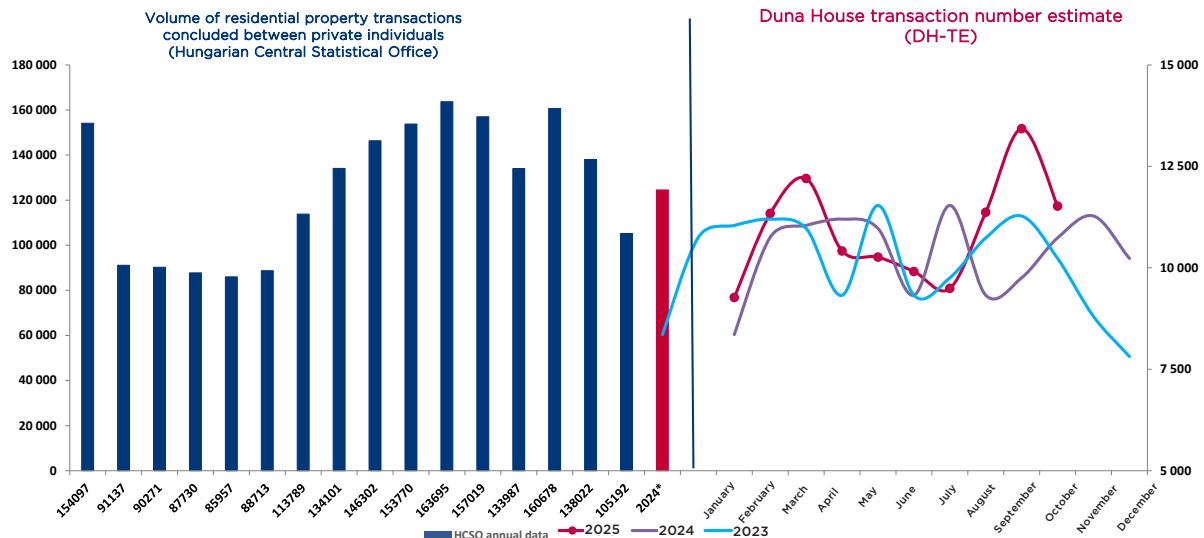
Further information:
Péter Szegő
Head Analyst
+36 30 312 5333
szego.peter@dh.hu

Duna House Holding Nyrt.
Credipass Kft.
1027 Budapest, Kapás utca 6-12.
+36 1 555 2222
www.dh.hu

TRANSACTION DATA

DUNA HOUSE TRANSACTION NUMBER ESTIMATE (DH-TE)

Duna House presents its monthly Transaction Number Estimate (DH-TE) and Mortgage Forecast below, showing that 9503 residential property transactions were concluded in November 2025 and residential mortgage contracts worth HUF 300 billion were signed in the whole of Hungary.



Compared to previous months, residential property market activity declined significantly in November. According to estimates based on proprietary Duna House data, 9503 residential properties changed hands nationwide, representing a 15.7% decrease compared to the same period last year. Compared to the previous month, there was a 17.5% decline.

Due to the market-stimulating effect of the Otthon Start Program (OSP), the number of transactions increased dramatically in August and September. After the peak of 13,426 sales in September, we saw a decline in October, and this trend continued in November.

On another note, the mortgage market saw another record monthly jump in November. According to domestic data from Credipass, the international financial brand of the Duna House Group, the volume of housing mortgage loans is estimated at HUF 300 billion for November, which is 53% higher than the October figure. On an annual basis, there was an unprecedented 165% increase compared to the figures published by the National Bank of Hungary for the same month last year.

Based on November data, the demand generated by the Otthon Start Program in August and September resulted in a lending volume in November that surpassed all previous records.

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

	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
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	9 323	9 754	10 738	11 277	10 231
2025	9 267	11 338	12 200	10 415	10 262	9908	9492	11369	13426	11518	9503	

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 by 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.

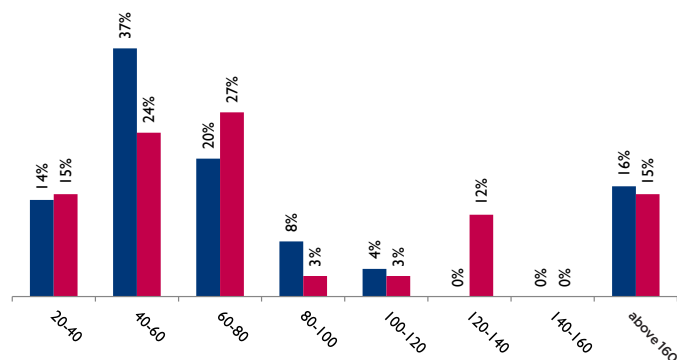
TRANSACTION PARAMETERS IN BUDAPEST

According to Duna House's November sales data, 27% of sales on the Buda side of the capital were for properties with a floor space between 60 and 80 sq. m., but properties measuring 40 to 60 sq. m. were also in demand, accounting for 24% of transactions. As a new phenomenon, properties priced below HUF 1 million per sq. m. were few and far between on the Buda side, and even on the Pest side, only 28% of sales happened below the HUF 1 million price range.

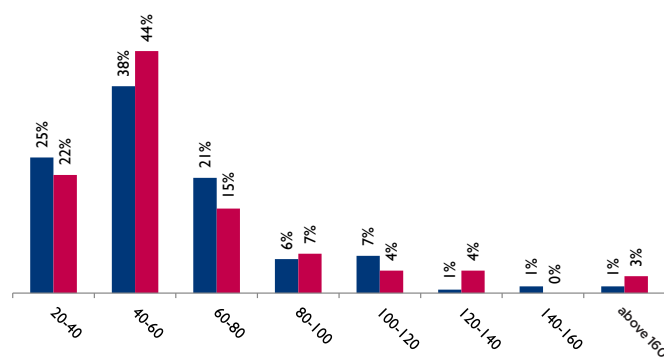
On the Pest side, Duna House clients were more interested in apartments between 40-60 (44%) and 20-40 sq. m. (22%). This time last year, the typical price per sq. m. in Pest was HUF 600-900 thousand, but by November 2025, properties priced between HUF 1.2 and 1.6 million were the most popular. Fifty percent of all homes in Pest that found new owners were in the price range north of HUF 60 million.

BUDA

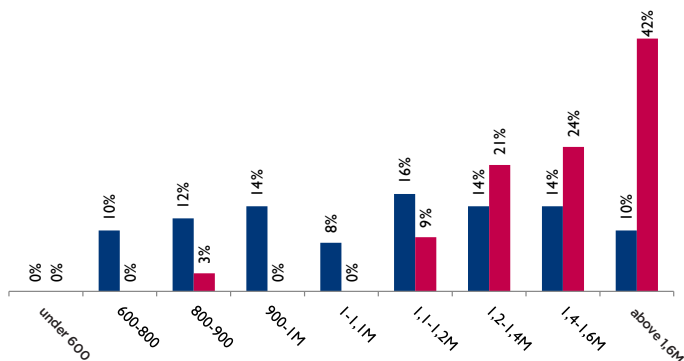
PEST



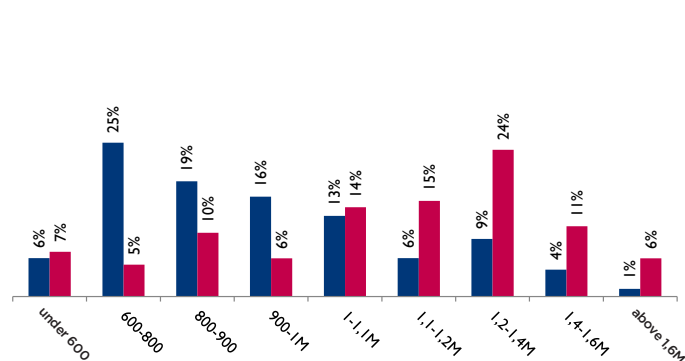
apartment size (m²)



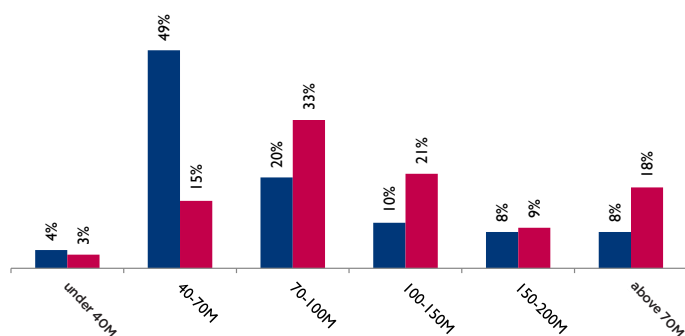
apartment size (m²)



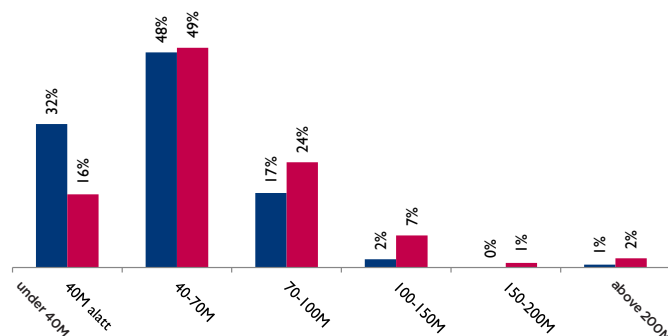
sq. m. price (in thousand HUF)



sq. m. price (in thousand HUF)



apartment price (in million HUF)



apartment price (in million HUF)

■ November 2024 ■ November 2025

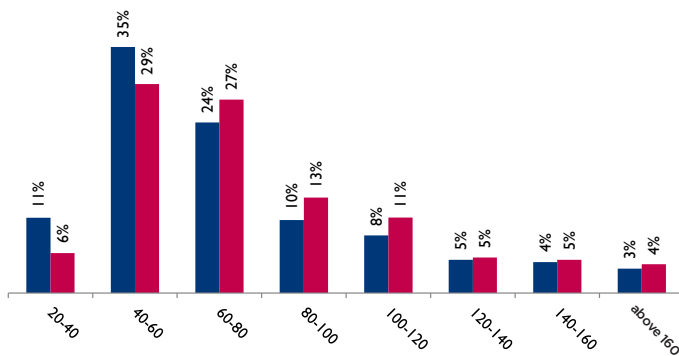
Based on properties sold by Duna House Franchise Network.

TRANSACTION PARAMETERS IN THE COUNTRY

Nationwide, with the exception of Central Hungary, Duna House experts observed the highest demand for properties with a floor space between 40–60 and 60–80 sq. m. The proportion of the cheapest houses and apartments, priced below HUF 250,000 per sq. m. is steadily declining, it accounted for only 15% of sales in November 2025. Forty-six percent of homes fell into the price category above HUF 600,000 per sq. m. In November this year, in 48% of cases buyers contracted for homes at prices exceeding HUF 40 million.

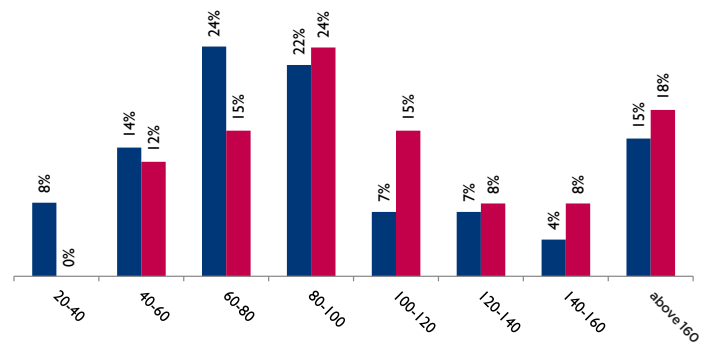
In County Pest, buyers preferred larger homes: 24% of transactions involved apartments and houses between 80 and 100 sq. m. and 18% were for homes larger than 160 sq. m. In terms of sq. m. prices, the category above HUF 600,000 dominated with a 57% share. Seventy-seven percent of sales were concluded at prices north of HUF 50 million.

COUNTRYWIDE (EXCLUDING CENTRAL HUNGARY)

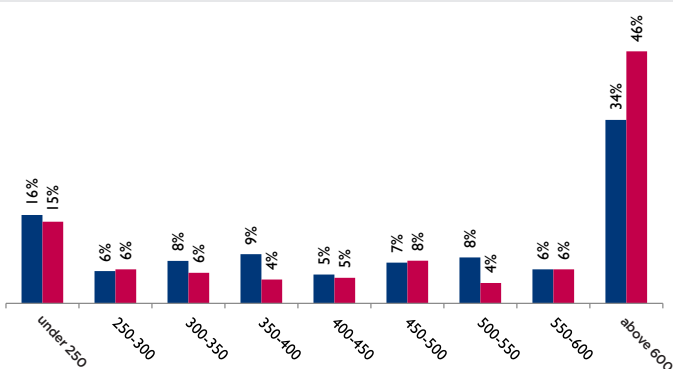


apartment size (m²)

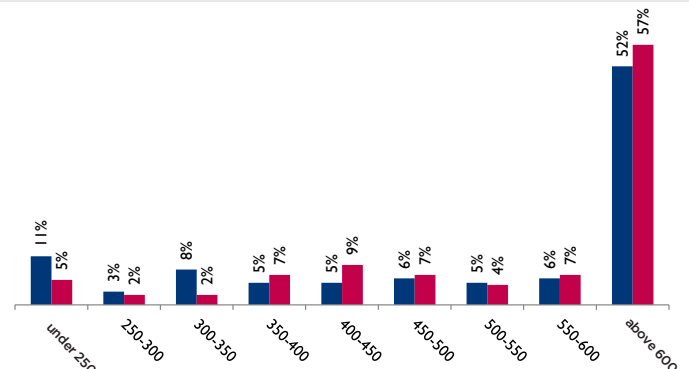
COUNTY PEST



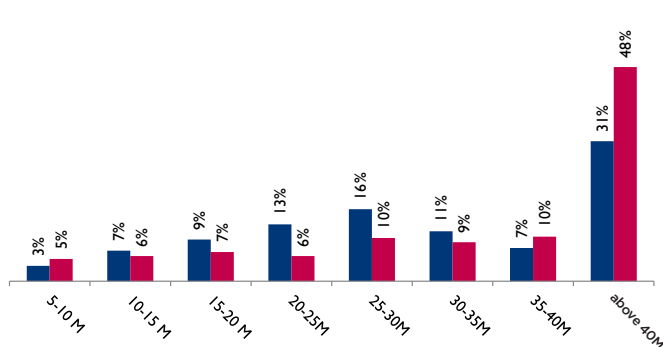
apartment size (m²)



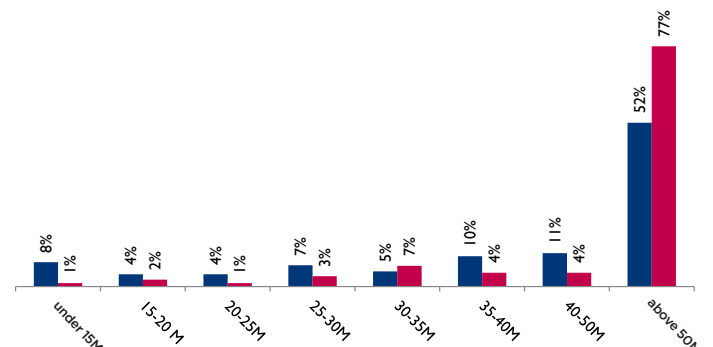
sq. m. price (in thousand HUF)



sq. m. price (in thousand HUF)



apartment price (in million HUF)



apartment price (in million HUF)

■ November 2024 ■ November 2025

Based on properties sold by Duna House Franchise Network.

SALES DATA – PRICES – BARGAINING MARGINS

According to data from Duna House, mixed monthly shifts could be observed in the Hungarian housing market between October and November 2025. The average price per sq. m. of concrete block apartments rose slightly, from HUF 718,500 to HUF 721,500, while total apartment prices fell from HUF 38.7 million to HUF 37.5 million. The change in the reference price remains a mere 1%, but buyers' bargaining power increased from 2% to 4%, indicating a strengthening of price sensitivity in demand. Overall, the monthly data show a combination of stagnating prices per sq. m. and moderating transaction prices.

PANEL COUNTRYWIDE				
	price	m ² price	change in listing price	bargain
October 2025	38 707 000	718 500	1%	2%
November 2025	37 477 000	721 500	1%	4%

The used brick and mortar segment nationwide also shows mixed monthly trends. The price per sq. m. increased from HUF 471,500 to HUF 481,500, but the total price of apartments decreased slightly (from HUF 41.43 million to HUF 41.28 million). The discount from the asking price decreased from 5% to 4%, while the extent of buyer bargaining increased from 5% to 6%. This means that advertising compromises in the brick and mortar segment decreased, but the actual room for negotiation increased, indicating increased buyer pressure.

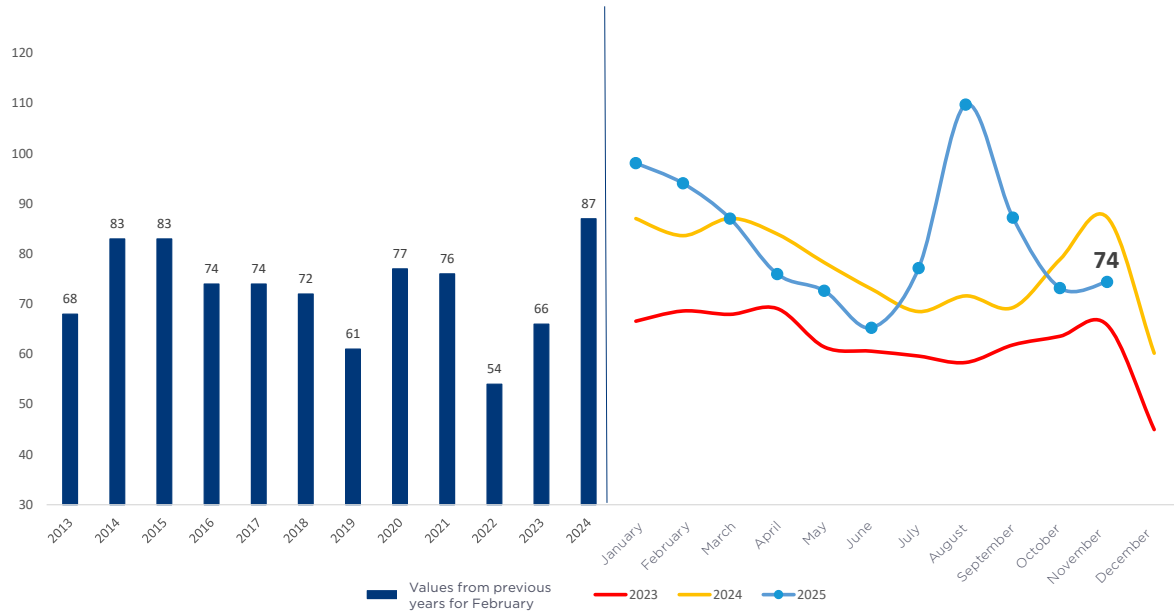
BRICK COUNTRYWIDE				
	price	m ² price	change in listing price	bargain
October 2025	41 430 500	471 500	5%	5%
November 2025	41 275 000	481 500	4%	6%

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

Owing to the Otthon Start Program, demand in the residential property market fell from a record high of 110 points in August to 87 points in September and 73 points in October, according to data from Duna House. By November, the demand index settled at 72 points. This figure is close to the average demand in November seen in previous years.

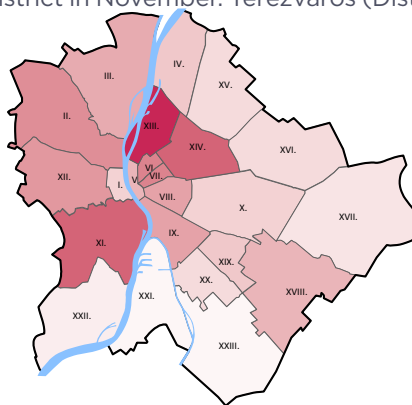


Methodology behind Demand Index: The basis of the estimate is the activity registered by our agents in various, mainly major cities and Duna House offices. Corrections are made depending on the number of active agents and working days. The Demand Index is an important indication of buyer side's reactions 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

In November 2025, District 13 remains the most popular in the capital: according to a survey by Duna House, 25.1% of home buyers indicated it as their preferred area. Zugló (District 14) was the second most popular with a share of 18.7%. Erzsébetváros (District 7) came in third, while Újbuda (District 11), after ranking among the top three in October, was only the sixth most popular district in November. Terézváros (District 6) was fourth and District 2 was fifth.

INTEREST TOWARD THE DISTRICTS IN BUDAPEST:



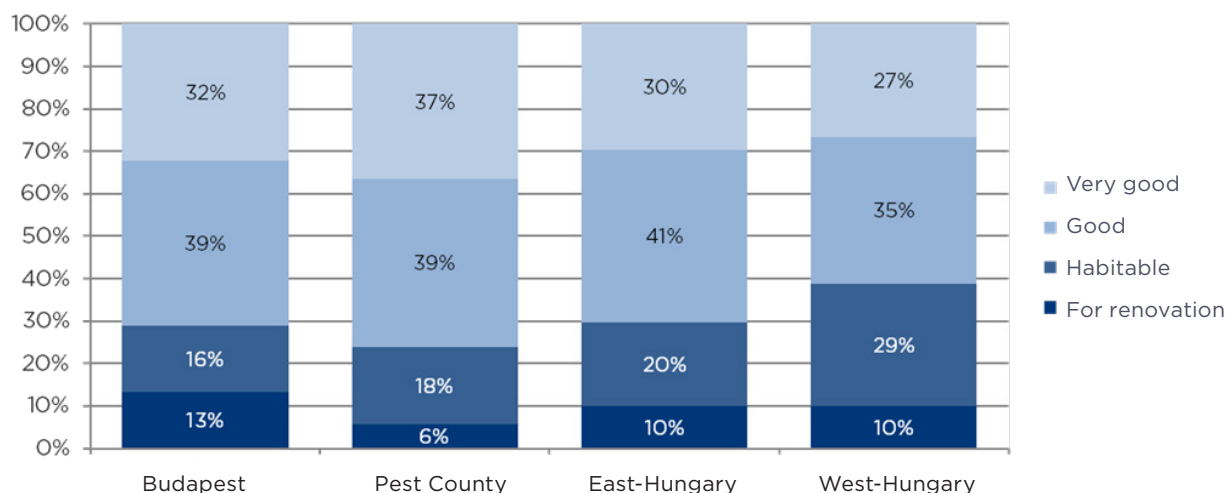
Methodology: Our clients with a purchase intention indicate their preferred districts (more at the same time) when meeting our agents. The above preference map is put together based on this "popularity information".

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.

DISTRICT	NOVEMBER 2024	NOVEMBER 2025
Bp. 01.	8,4%	9,8%
Bp. 02.	18,2%	17,7%
Bp. 03.	12,5%	12,1%
Bp. 04.	9,4%	9,5%
Bp. 05.	10,7%	12,1%
Bp. 06.	15,6%	17,7%
Bp. 07.	15,8%	17,8%
Bp. 08.	12,9%	13,7%
Bp. 09.	14,9%	15,4%
Bp. 10.	8,3%	7,6%
Bp. 11.	19,0%	17,6%
Bp. 12.	14,4%	13,1%
Bp. 13.	21,4%	25,1%
Bp. 14.	18,6%	18,7%
Bp. 15.	6,5%	8,3%
Bp. 16.	5,5%	6,8%
Bp. 17.	4,9%	5,6%
Bp. 18.	8,8%	9,5%
Bp. 19.	8,5%	7,1%
Bp. 20.	5,4%	6,0%
Bp. 21.	3,2%	3,5%
Bp. 22.	5,3%	4,4%
Bp. 23.	1,9%	2,9%

QUALITY PREFERENCES

Based on Duna House's sales data for November 2025, most contracts (35-41%) were signed for properties in a good overall condition. The second most sought-after category was 'very good'. The propensity to renovate was lowest in County Pest, at 6%, while in both Eastern and in Western Hungary, 10% of contracts were for homes awaiting a complete overhaul. The proportion of homes in need of renovation was highest in Budapest, at around 13%.



TURNOVER SPEED (TIME NEEDED TO SELL)

According to data from Duna House for November 2025, concrete block apartments continued to sell the fastest in Hungary, with units in the capital changing hands in an average of 63 days.

The turnover speed for brick and mortar apartments is slower nationwide, with an average of 3-3.5 months required in the country. In Pest, Buda, and downtown Budapest areas, it takes an average of 2.5-3 months to sign a contract, according to Duna House data. November 2025 data show a significant acceleration in almost all segments, in some cases by 20-30 days compared to turnover speeds one year earlier.

PANEL				
TIME NEED OF SALE (DAY)				
	EAST	WEST	BUDA	PEST
November 2024	96	95	80	65
November 2025	67	86	63	63

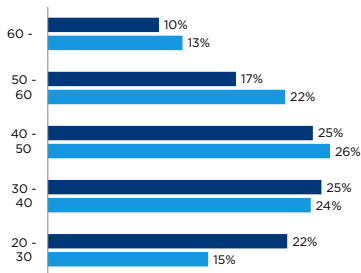
BRICK					
TIME NEED OF SALE (DAY)					
	EAST	WEST	BUDA	PEST	INNER CITY
November 2024	130	133	125	131	115
November 2025	102	111	88	89	75

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

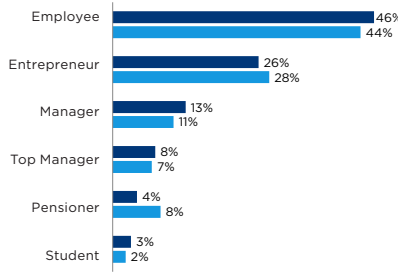
According to data on contracts signed in the capital with the involvement of Duna House, the 30–40 and 40–50 age groups were the most active buyers in November 2025, accounting for 25–26% of the total. However, as a result of the Otthon Start Program, the proportion of 20–30-year-olds increased significantly, from 15% in the previous year to 22%. Forty-six percent of buyers were employees. At the same time, the proportion of those signing contracts for investment purposes in Budapest fell significantly, from 38% to 29%. The proportion of clients buying their first home rallied from 19% to 41%. All this suggests that the Otthon Start Program was able to help lower-income homebuyers. Investors spent HUF 73.5 million on residential property purchases in the capital, while first-time homebuyers spent HUF 66.2 million.

BUYERS' AGE IN BUDAPEST



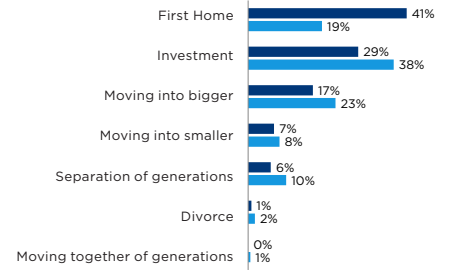
AGE	AVERAGE PRICE	m ²
20 - 30	69 599 000	51
30 - 40	89 118 000	92
40 - 50	114 837 000	81
50 - 60	66 186 000	57
60 -	100 629 000	76

BUYERS' STATUS IN BUDAPEST



STATUS	AVERAGE PRICE	m ²
Employee	62 255 000	62
Top Manager	111 068 000	80
Manager	113 033 000	76
Pensioner	69 913 000	57
Student	68 134 000	50
Entrepreneur	99 340 000	89

MOTIVATION IN BUDAPEST

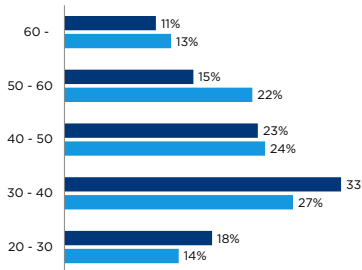


SITUATION	AVERAGE PRICE	m ²
Investment	73 492 000	74
First Home	61 246 000	50
Separation of generations	66 129 000	55
Moving together of generations	-	-
Moving into smaller	119 569 000	68
Moving into bigger	160 840 000	131
Divorce	92 000 000	55

BUYER PROFILE IN THE COUNTRY

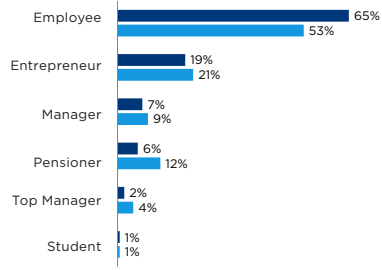
In November 2025, 33% of home buyers in the country were in the 30–40 age group. Sixty-five percent of Duna House clients were employees. The purchase of a first home was the leading motivation in the country, too, with its proportion rising to 43% in November this year, compared to 25% in November 2024. The share of investment purchases decreased in the country, too, from 30% to 19%. Buyers spent HUF 36.6 million on a residential property investment and HUF 49.3 million on their first home.

BUYERS' AGE IN THE COUNTRY



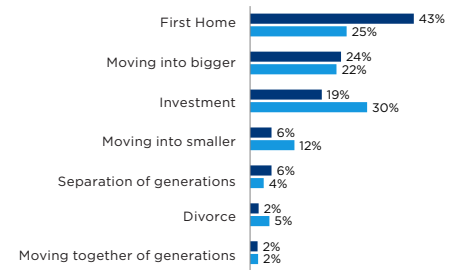
AGE	AVERAGE PRICE	m ²
20 - 30	51 036 000	99
30 - 40	52 654 000	95
40 - 50	46 026 000	81
50 - 60	47 604 000	80
60 -	49 986 000	77

BUYERS' STATUS IN THE COUNTRY



STATUS	AVERAGE PRICE	m ²
Employee	49 288 000	90
Top Manager	84 000 000	106
Manager	62 523 000	86
Pensioner	44 650 000	75
Student	28 200 000	66
Entrepreneur	48 522 000	86

MOTIVATION IN THE COUNTRY



SITUATION	AVERAGE PRICE	m ²
Investment	36 593 000	65
First Home	49 308 000	90
Separation of generations	38 710 000	83
Moving together of generations	86 143 000	139
Moving into smaller	40 325 000	85
Moving into bigger	65 697 000	106
Divorce	27 288 000	78

■ November 2024 ■ November 2025

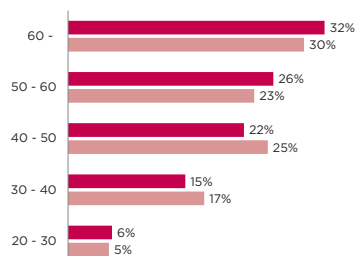
Under our methodology investment as a motivation includes all property transactions that, judged by the buyer's characteristics, can be considered as an investment, i.e. this is not a strictly business category. It includes all family investments and short-term investors who buy a property in a poor 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.

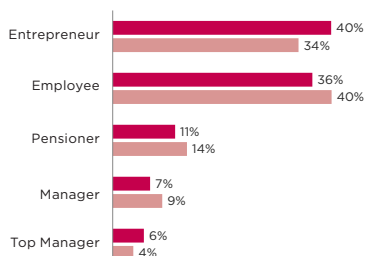
SELLER PROFILE IN BUDAPEST

According to transaction data from November 2025, 32% of sales in the capital involved sellers over the age of 60, with 40% of clients being self-employed. The most common motivation for sellers was to parting with a previous investment, at 38%. This proportion increased compared to 30% in October last year. Twenty-five percent of sellers moved into larger properties, and 17% were selling an inherited home.

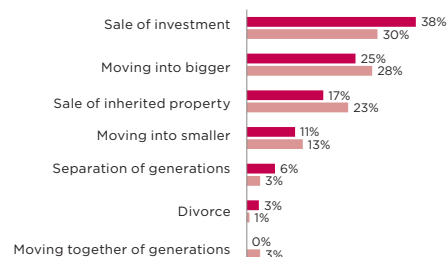
SELLERS' AGE BUDAPEST



SELLERS' STATUS BUDAPEST



MOTIVATION BUDAPEST



AGE	AVERAGE PRICE	m²
20 - 30	60 050 000	57
30 - 40	70 742 000	54
40 - 50	83 689 000	71
50 - 60	102 198 000	79
60 -	77 762 000	81

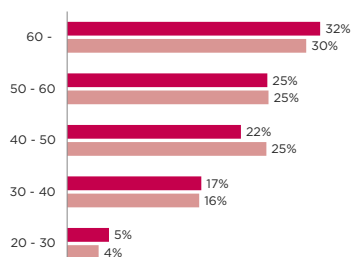
STATUS	AVERAGE PRICE	m²
Employee	68 294 000	70
Top Manager	200 170 000	108
Manager	65 684 000	50
Pensioner	83 040 000	71
Entrepreneur	110 046 000	90

SITUATION	AVERAGE PRICE	m²
Sale of investment	106 806 000	70
Separation of generations	78 629 000	113
Moving together of generations	-	-
Moving into smaller	76 230 000	85
Moving into bigger	71 486 000	54
Sale of inherited property	75 843 000	83
Divorce	133 834 000	94

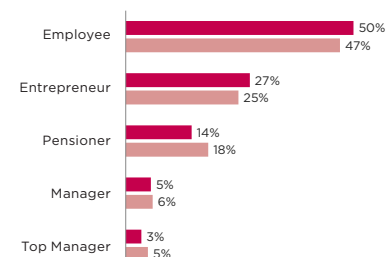
SELLER PROFILE IN THE COUNTRY

According to Duna House sales data, in November 2025, 32% of sellers were over 60 years old, and 25% were fell into the 50-60 age group. Half of the sellers were employees, 27% were self-employed. In the country, in 29% of cases, sellers were selling properties that they had previously purchased as an investment, while 25% sold inherited properties. The proportion of those moving into a smaller or a larger home was 18% and 17%, respectively.

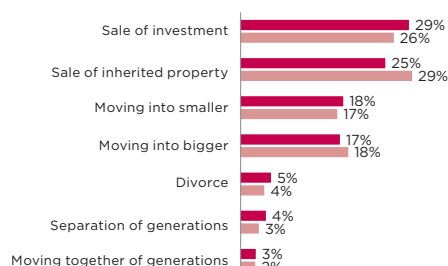
SELLERS' AGE IN THE COUNTRY



SELLERS' STATUS IN THE COUNTRY



MOTIVATION IN THE COUNTRY



AGE	AVERAGE PRICE	m²
20 - 30	32 716 000	78
30 - 40	45 884 000	77
40 - 50	53 851 000	89
50 - 60	49 152 000	96
60 -	44 317 000	88

STATUS	AVERAGE PRICE	m²
Employee	46 951 000	92
Top Manager	72 600 000	87
Manager	60 419 000	76
Pensioner	43 865 000	95
Entrepreneur	62 845 000	89

SITUATION	AVERAGE PRICE	m²
Sale of investment	52 170 000	73
Separation of generations	53 400 000	88
Moving together of generations	52 445 000	99
Moving into smaller	57 401 000	118
Moving into bigger	50 460 000	83
Sale of inherited property	39 195 000	90
Divorce	69 300 000	102

■ November 2024 ■ November 2025

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.



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1027 Budapest, Kapás utca 6-12. • Phone: +36 1 555 2222 • Fax: +36 1 555 2220

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