

DUNA HOUSE BAROMETER

The latest property market info
from Duna House network

Issue 166
April 2025



DHS
BÉT
**PRIME
MARKET**
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the Budapest Stock Exchange



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FORTHCOMING ISSUES

DATE OF ISSUE	CONTENT
12.06.2025	May 2025 data
14.07.2025	Q2 2025 data (including price indices and housing loan data)
12.08.2025	July 2025 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

HOUSING MARKET CORRECTION – FALLING DEMAND DUE TO HIGH PRICE LEVELS

In April 2025, the dynamic housing market momentum seen early in the year came to a halt: according to Duna House estimates 10,415 residential property sales were recorded nationwide, 14.6% fewer than in the previous month and 7% down on April 2024. In addition to a significant rise in property prices, the slowdown may be due to a number of factors, including school holidays and long weekends, which have dampened demand. Accordingly, the Duna House buyer demand index fell by 11 points and now stands at 76 points.

The forceful price increases of previous quarters are already moderating demand, thus putting a brake on the market. Considering that most of the price increases forecast for 2025 have already taken place in the first quarter, no significant price increases are expected for the rest of the year. We forecast price movements of a few percent at most for the coming quarters.

The residential mortgage market continued to expand moderately: Credipass estimates that HUF 127 billion of residential mortgages were taken out, representing a 2% monthly and 5% annual growth. Given the time needed for the processing of loan applications, there is a good chance that the next 2 months will still be very strong.

In Budapest, prices continued to rise: the sq. m. price of brick and mortar apartments in Pest increased by 33% in a year, reaching HUF 945,000, while in Buda, the average sq. m. price of concrete block units was north of HUF 1.1 million. In downtown Pest, the average price of brick and mortar homes exceeded HUF 1.2 million per sq. m.

While in April last year the price bracket of 600-800,000 HUF per sq. m. was the most typical for properties sold in Budapest, in April this year most apartments found new owners at prices in the range of HUF 1.2-1.4 million per sq. m.

In the country, buyers most often opted for properties in a good condition (38-41%), but in the capital and in Western Hungary there was a strong demand for homes in need of renovation, too.

Transaction data show that properties in Budapest sold in 2-3 months, with concrete block apartments changing hands the fastest. In the country, sales of pre-owned brick and mortar homes took nearly 4 months.

In Budapest, 43% of buyers were buying as an investment and 23% were moving into a larger home. Investors and first-time buyers spent 74.8 million HUF and 66.4 million HUF on average, respectively. In the country, first-timers were the most active (29%), while the share of investors was 26%.

The proportion of sellers over 60 years of age decreased in the capital, with most (33%) coming from the 50-60 age group and 40% selling a previous investment. In the country, the majority (34%) of sellers were aged 60 and over, and the main motivation was again selling an investment (28%) or an inherited property (24%).

District 13 continued to lead the popularity ranking of districts (with a share of 20.1%), with District 2 in second (18%) and District 11 in third place (17.9%).

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FACTS TO NOTE

Price per sq. m. of brick and mortar apartments in Pest increased by 33% in a year.

The dynamic price increases of the previous quarters are already moderating demand, thus putting a brake on the market.

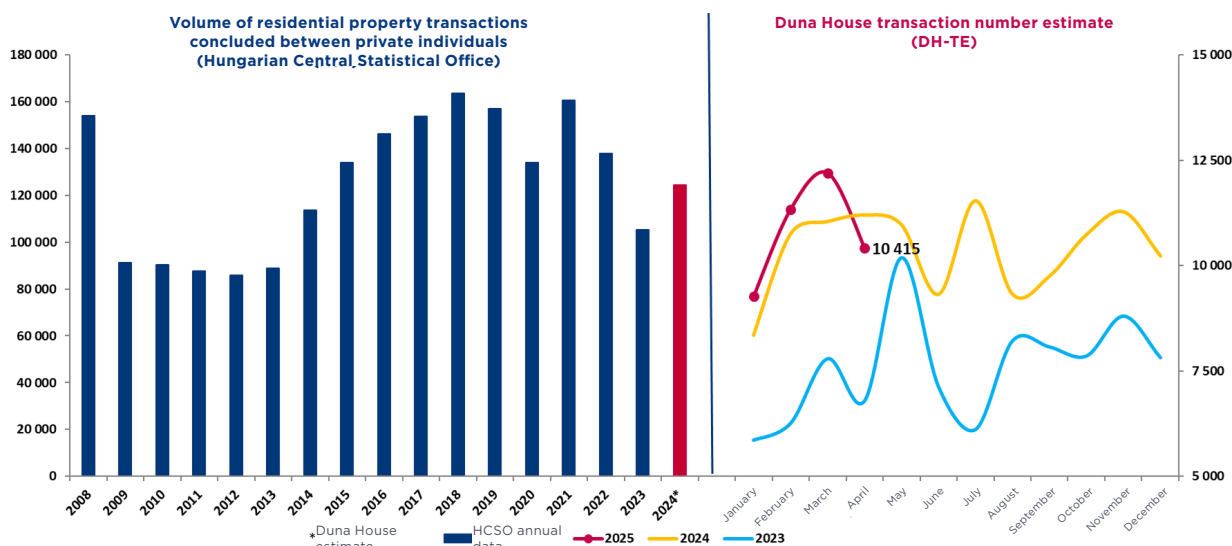
There are no significant price increases expected for the rest of the year.

Even with the fall in demand, turnover speeds have accelerated.

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 10,415 residential property transactions were concluded in April 2025 and residential mortgage contracts worth HUF 127 billion were signed in the whole of Hungary.



The brisk start to the year in the housing market stalled in April. The slowdown was due to the stronger-than-usual effect of the spring school holidays, the impact of four-day weekends and soaring house prices, which combined to dampen demand.

After the gradual increase in transaction numbers we have seen so far, April brought a slight decline, with an estimated 10,415 sales transactions for the month, down 14.6% on March 2025 and 7% on the same period last year.

That said, the mortgage market volume is showing moderate growth: according to the estimates for Hungary of Credipass, the international financial brand of the Duna House Group, the mortgage market saw HUF 127 billion in contracted residential mortgage loans in April this year.

Last month's performance represents a 2% increase compared to the volume estimated by experts for March, and a 5% improvement compared to hard data published by MNB, the National Bank of Hungary for the same period in 2024.

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								

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.

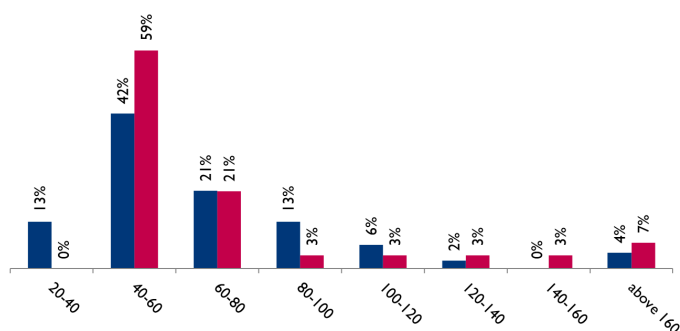
Mortgage forecast: Figures published by Credipass can primarily be used for quick trend forecasts; the National Bank of Hungary publishes the actual figures for the second last month at the beginning of each month.

TRANSACTION PARAMETERS IN BUDAPEST

In April 2025, most (59%) of Duna House clients on the Buda side of the capital signed contracts for properties with a floor space of 40-60 sq. m., while the 60-80 sq. m. category was also popular (21%). 26% of properties sold at prices ranging between HUF 1.2-1.4 million per sq. m., and almost half of the houses and apartments on offer in Buda had a price tag of over HUF 70 million. On the Pest side, the distribution of apartment sizes was more even, but again, the majority (32%) of contracts were for properties with a floor space between 40-60 sq. m.

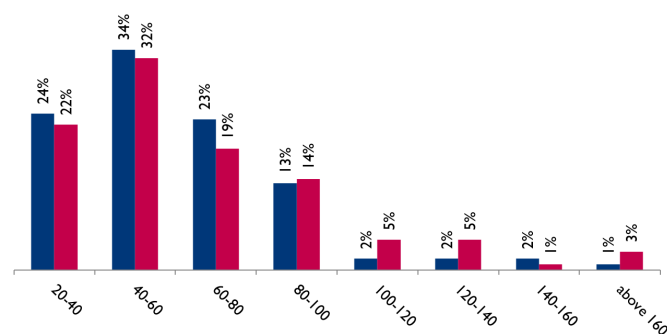
In the same period last year, most residential properties were sold at an average price of HUF 600-800,000 per sq. m., but in April 2025 the majority of homes were priced between HUF 1.2-1.4 million per sq. m. About a third of all properties on the Pest side and almost half of those in Buda sold for over HUF 70 million.

BUDA

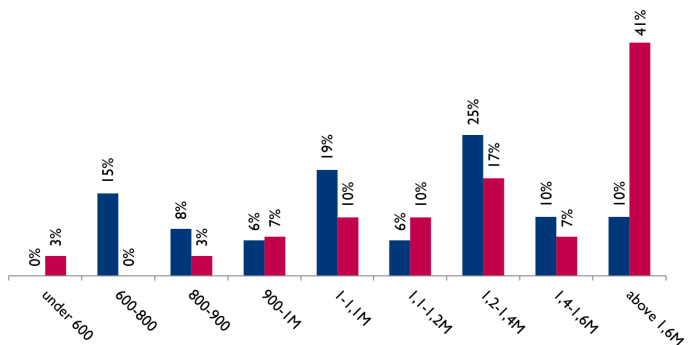


Apartment size (sq. m.)

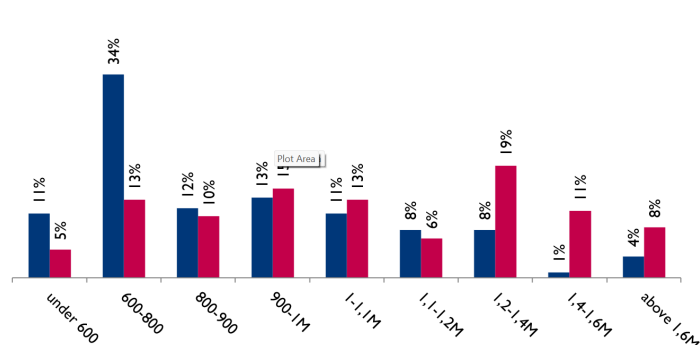
PEST



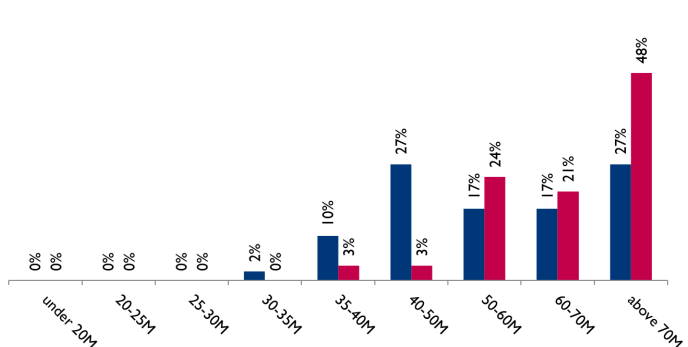
Apartment size (sq. m.)



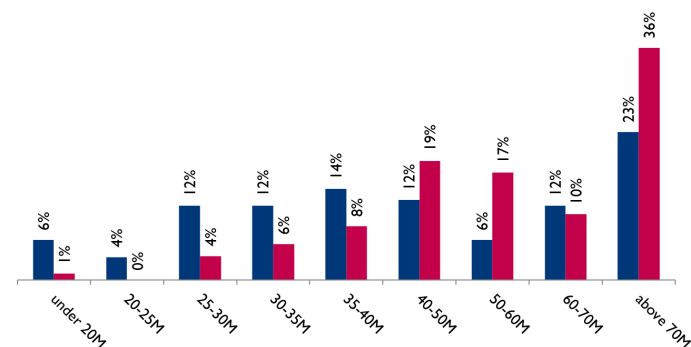
Sq. m. price (in thousand HUF)



Sq. m. price (in thousand HUF)



Apartment price (in million HUF)



Apartment price (in million HUF)

■ April 2024 ■ April 2025

Based on properties sold by the Duna House Franchise Network.

TRANSACTION PARAMETERS IN THE COUNTRY

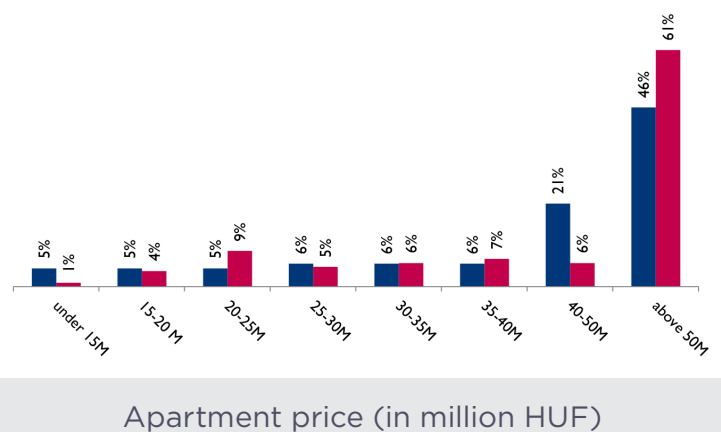
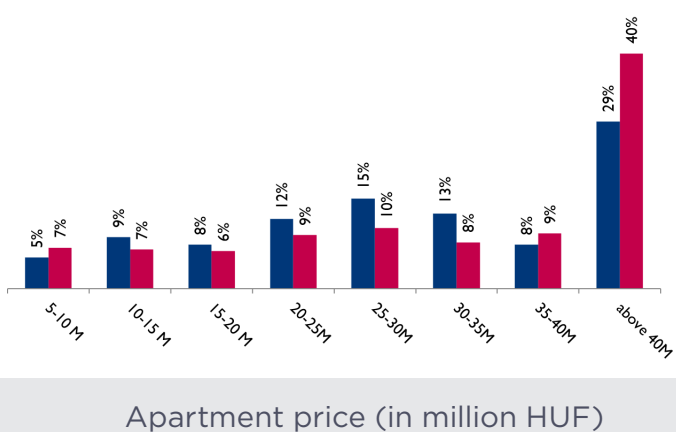
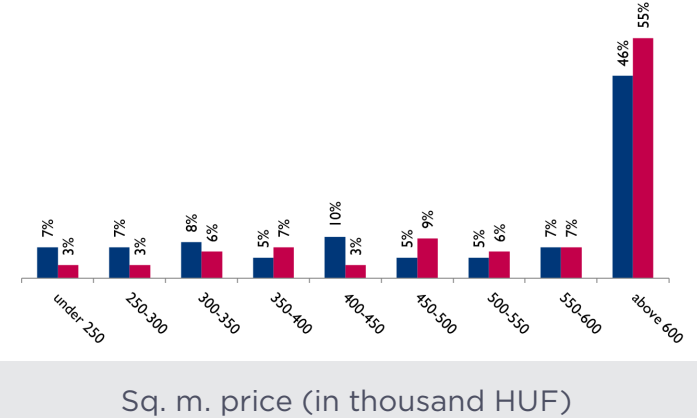
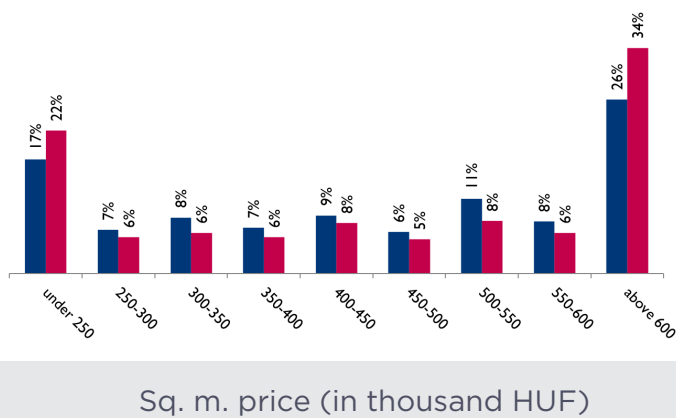
Nationally (with the exception of Central Hungary), homes between 40-60 sq. m. accounted for 25% of transactions, but the 60-80 sq. m. category was also popular. Comparing the data from a year earlier, we see that the share of smaller homes has decreased while that of larger properties has increased. 34% of the properties sold were priced above HUF 600,000 per sq. m., while 22% had a price tag below HUF 250,000 per sq. m.

Most (40%) of the properties sold were worth over HUF 40 million. 21% of the homes sold in County Pest had a floor space between 60-80 sq. m., but the number of smaller homes between 40-60 sq. m. was similar. 55% of them were bought for over HUF 600,000 per sq. m. Among Duna House transactions in County Pest, the most common price bracket was HUF 50 million and above in April 2025.

COUNTRYWIDE (EXCLUDING CENTRAL HUNGARY)



PEST COUNTY



■ April 2024 ■ April 2025

Based on properties sold by the Duna House Franchise Network.

SALES DATA – PRICES – BARGAINING MARGINS

There was a noticeable increase in the price level of concrete block units, while the increase in the average price per sq. m. of brick and mortar homes was significant in Western Hungary and moderate in the Eastern part of the country. In the East and in the West, buyers paid an average of HUF 653,000 and 628,000 per sq. m. for concrete block homes, respectively. Owners of concrete block units in the country lowered the asking price by an average 3-5% during the bargaining process. Sellers of brick and mortar homes changed their prices by an average of 2-3% during the listing period, with a further buyers' bargain at a rate of 6-7%. In the East, pre-owned brick and mortar homes were priced at HUF 361,000 per sq. m., while in the Western counties the average sq. m. price was around HUF 481,000.

BLOCK COUNTRYWIDE								
EAST					WEST			
	price	sq. m. price	change in listing price	bargain	price	sq. m. price	change in listing price	bargain
April 2024	29 577 000	587 000	0%	5%	27 700 000	534 000	5%	7%
April 2025	31 491 000	653 000	1%	5%	31 466 000	628 000	1%	3%

BRICK COUNTRYWIDE								
EAST					WEST			
	price	sq. m. price	change in listing price	bargain	price	sq. m. price	change in listing price	bargain
April 2024	30 264 000	350 000	4%	6%	31 530 000	365 000	5%	7%
April 2025	31 678 000	361 000	2%	6%	42 024 000	481 000	3%	7%

In April 2025, the price increase of concrete block units in the capital was still the highest: in Buda the average price per sq. m. exceeded HUF 1.1 million, while in the districts of Pest the average price per sq. m. for the same type of properties was higher than HUF 1 million. Owners of concrete block units in Pest did not change their asking price, and bargaining was not common either. On the Buda side, on the other hand, sellers reduced their advertised prices by an average of 6%, and even gave in to bargaining at a rate of 3%. The price per sq. m. of brick and mortar apartments in Pest rose sharply by 33% from HUF 713,000 in April last year to HUF 945,000 in April 2025. The average sq. m. price of flats in Buda has risen by 20%, while in the centre of Pest it has climbed to over HUF 1.2 million. The change in the asking price of brick and mortar apartments in the capital was a negligible 1-2%, with bargains around 3-5%.

BLOCK BUDAPEST								
BUDA					PEST			
	price	sq. m. price	change in listing price	bargain	price	sq. m. price	change in listing price	bargain
April 2024	45 955 000	962 000	1%	0%	40 639 000	791 000	1%	4%
April 2025	62 289 000	1 113 000	6%	3%	53 824 000	1 085 000	0%	0%

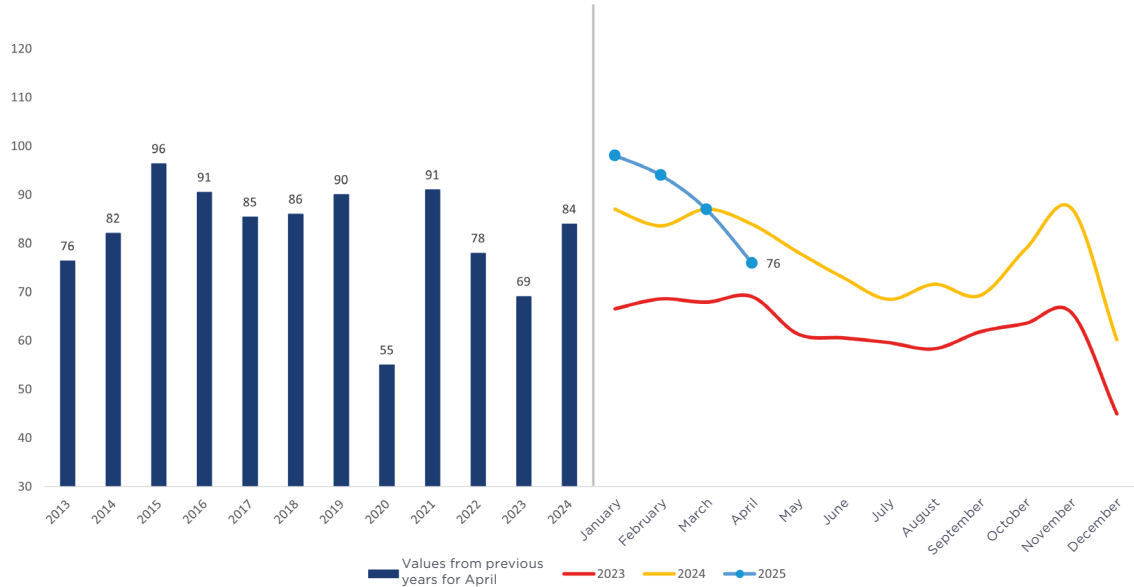
BRICK BUDAPEST												
BUDA					PEST				INNER CITY			
	price	sq. m. price	change in listing price	bargain	price	sq. m. price	change in listing price	bargain	price	sq. m. price	change in listing price	bargain
April 2024	102 296 000	1 110 000	8%	4%	49 000 000	713 000	4%	5%	53 127 000	945 000	5%	5%
April 2025	112 329 000	1 334 000	1%	3%	62 540 000	945 000	0%	3%	84 603 000	1 253 000	2%	5%

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

According to the Buyer Demand Index published by Duna House, the activity of potential buyers in the domestic housing market decreased last month. Compared to the March reading, the index is down by a further 11 points at 76, below the April 2024 level but still higher than in the same month in 2023.

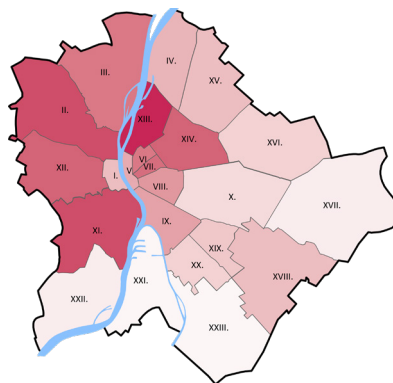


Methodology behind Demand Index: The basis of the estimate is the activity registered by our agents in various, mainly major cities and Duna House offices. Corrections are made depending on the number of active agents and working days. The Demand Index is an important indication of buyer side's reactions 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 April 2025, the Budapest housing market was characterised by a strengthening of the Buda districts. According to the popularity survey, District 13 maintains its leading position, with 20.1% of clients indicating it as their preferred location. Terézváros (District 6), which had a podium place at the beginning of the year, has slipped down the rankings, with District 2 now the second most sought-after district with a share of 18%, closely followed by District 11 (17.9%).

CHANGE OF DEMAND FOR THE DISTRICTS OF THE CAPITAL



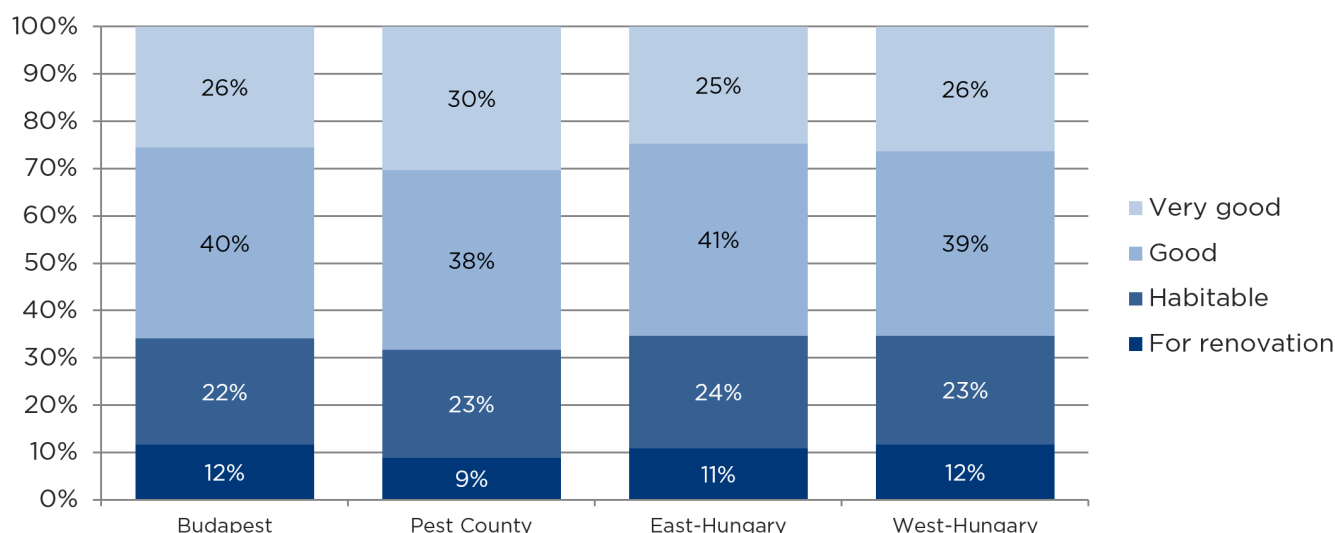
Methodology: Our clients with a purchase intention indicate their preferred districts (more at the same time) when meeting our agents. The above preference map is put together based on this "popularity information".

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	APRIL 2024	APRIL 2025
District 1	8,0%	8,9%
District 2	15,5%	18,0%
District 3	10,3%	14,4%
District 4	7,3%	9,9%
District 5	10,0%	10,8%
District 6	15,8%	14,6%
District 7	14,9%	15,3%
District 8	10,0%	12,6%
District 9	10,4%	11,3%
District 10	6,8%	6,4%
District 11	17,0%	17,9%
District 12	14,0%	16,3%
District 13	18,4%	20,1%
District 14	14,9%	16,1%
District 15	5,8%	8,7%
District 16	5,2%	7,5%
District 17	5,2%	4,9%
District 18	10,0%	9,4%
District 19	7,9%	7,9%
District 20	5,6%	7,0%
District 21	2,6%	3,8%
District 22	4,7%	4,7%
District 23	2,3%	2,8%

QUALITY PREFERENCES

In April this year, Duna House clients across the country preferred properties in a good condition (38%-41%), with the second most sought-after category being the higher-priced homes in a very good repair (25-30%). The propensity to renovate was highest in the capital and in Western Hungary (12%). 11% of all sales completed in Eastern Hungary and 9% of transactions in County Pest involved homes in need of a complete overhaul.



TURNOVER SPEED (TIME NEEDED TO SELL)

Despite the softening demand and falling transaction numbers, turnover speed of the housing market has picked up, according to Duna House. Concrete block units in the capital changed hands in the shortest time, in 2 months on average, while the sale of similar units in the country took just over 2.5 months on average. Pre-owned brick and mortar flats and houses took nearly 4 months to sell in the country, while in the capital it took 3 months to close a deal successfully.

BLOCK				
TIME NEEDED OF SALE/DAY				
	EAST	WEST	BUDA	PEST
April 2024	86	93	114	104
April 2025	81	78	60	52

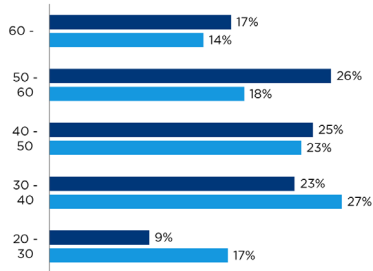
BRICK					
TIME NEEDED OF SALE/DAY					
	EAST	WEST	BUDA	PEST	INNER CITY
April 2024	118	121	138	117	117
April 2025	105	127	90	96	91

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.

BUYER PROFILE IN BUDAPEST

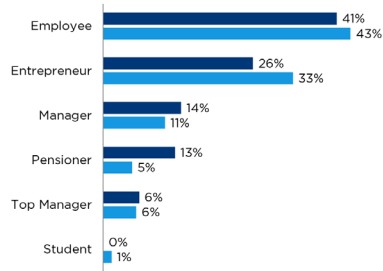
According to data pertaining to transactions closed in April with the help of Duna House, the most active buyers were in the 40-50 and 50-60 age groups, with a share of 25% and 26%, respectively. The majority (41%) of buyers were employees. In April this year, 43% of buyers in the capital were making an investment, while 23% were buying a larger home. Investors and first-home buyers spent HUF 74.8 million and HUF 66.4 million on property purchases in Budapest, respectively.

BUYERS' AGE IN BUDAPEST



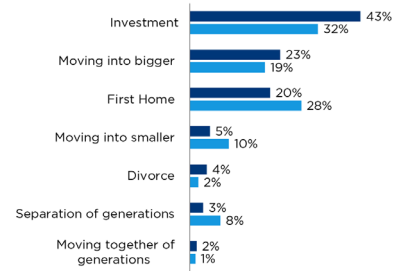
AGE	AVERAGE PRICE	sq. m.
20 - 30	60 710 000	56
30 - 40	74 237 000	79
40 - 50	83 938 000	75
50 - 60	76 521 000	64
60 -	73 203 000	54

BUYERS' STATUS IN BUDAPEST



STATUS	AVERAGE PRICE	sq. m.
Employee	67 680 000	61
Top Manager	105 584 000	65
Manager	81 589 000	72
Pensioner	76 528 000	68
Student	-	-
Entrepreneur	84 641 000	73

MOTIVATION IN BUDAPEST

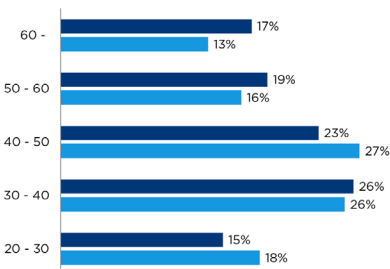


SITUATION	AVERAGE PRICE	sq. m.
Investment	74 804 000	61
First Home	66 434 000	59
Separation of generations	69 850 000	53
Moving together of generations	73 950 000	104
Moving into smaller	70 984 000	62
Moving into bigger	99 304 000	97
Divorce	55 480 000	51

BUYER PROFILE IN THE COUNTRY

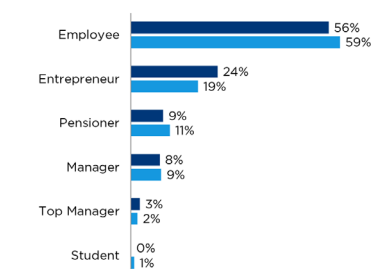
In April 2025, 26% of buyers in the country were in the 30-40 age group and 23% in the 40-50 age group. 56% of buyers in this category were employees. Most sales (29%) in the country involved first-time buyers, but investors and those moving into a larger property were also active, accounting for an equal share of 26%. In the country, buyers spent an average of HUF 35.8 million on an investment and HUF 38.6 million on their first home.

BUYERS' AGE IN THE COUNTRY



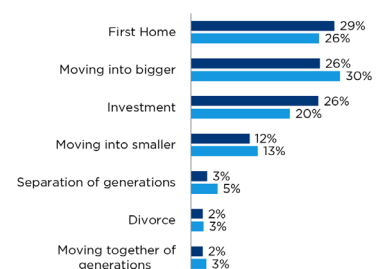
AGE	AVERAGE PRICE	sq. m.
20 - 30	36 734 000	84
30 - 40	45 119 000	90
40 - 50	48 498 000	83
50 - 60	41 126 000	81
60 -	52 283 000	85

BUYERS' STATUS IN THE COUNTRY



STATUS	AVERAGE PRICE	sq. m.
Employee	39 254 000	84
Top Manager	76 582 000	86
Manager	56 800 000	98
Pensioner	39 210 000	74
Student	11 000 000	73
Entrepreneur	55 487 000	91

MOTIVATION IN THE COUNTRY



SITUATION	AVERAGE PRICE	sq. m.
Investment	35 885 000	58
First Home	38 608 000	83
Separation of generations	40 964 000	80
Moving together of generations	77 812 000	146
Moving into smaller	39 624 000	76
Moving into bigger	60 247 000	116
Divorce	44 700 000	85

■ April 2024 ■ April 2025

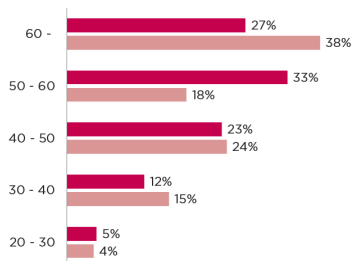
Under our methodology investment as a motivation includes all property transactions that, judged by the buyer's characteristics, can be considered as an investment, i.e. this is not a strictly business category. It includes all family investments and short-term investors who buy a property in a poor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

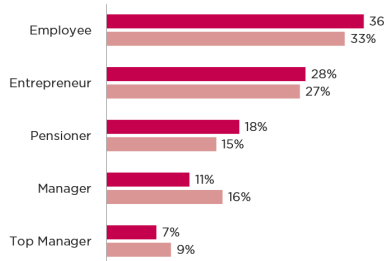
SELLER PROFILE IN BUDAPEST

The largest proportion (33%) of sellers in the capital were aged between 50-60. Compared to a year earlier, the number of sellers aged 60 and over has fallen significantly. 36% of owners selling their residential property were employees. In the capital, 40% of sellers were motivated by cashing in on a previous investment, while 23% were selling an inherited property and 20% were offering their home for sale in order to move into a larger property.

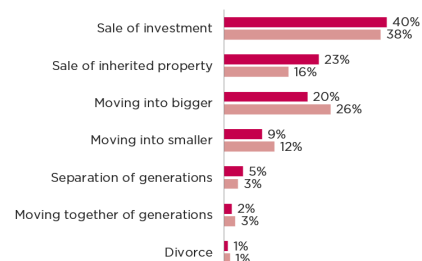
SELLERS' AGE IN BUDAPEST



SELLERS' STATUS IN BUDAPEST



MOTIVATION IN BUDAPEST



AGE	AVERAGE PRICE	sq. m.
20 - 30	54 202 000	54
30 - 40	60 193 000	56
40 - 50	66 499 000	63
50 - 60	85 106 000	72
60 -	65 115 000	69

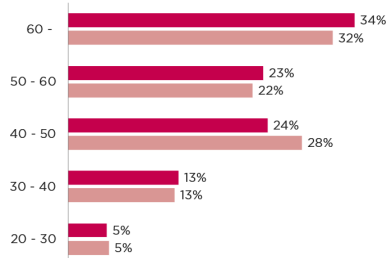
STATUS	AVERAGE PRICE	sq. m.
Employee	55 842 000	59
Top Manager	66 967 000	45
Manager	90 112 000	66
Pensioner	61 727 000	64
Entrepreneur	88 849 000	79

SITUATION	AVERAGE PRICE	sq. m.
Sale of investment	77 052 000	67
Separation of generations	69 800 000	72
Moving together of generations	57 000 000	62
Moving into smaller	96 580 000	108
Moving into bigger	54 860 000	51
Sale of inherited property	83 104 000	79
Divorce	63 454 000	52

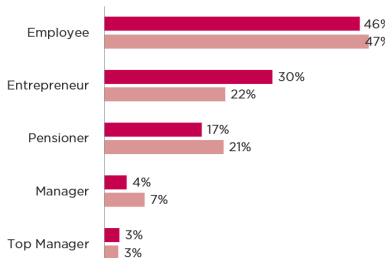
SELLER PROFILE IN THE COUNTRY

According to Duna House sales data, 34% of sellers in the country in April this year fell in the 60+ age category. 46% of those parting with their residential property worked as employees and 30% were self-employed. Similarly to the capital, the sale of a previous investment led the ranking (28%) in the country, too, while in 24% of cases sellers were selling an inherited property.

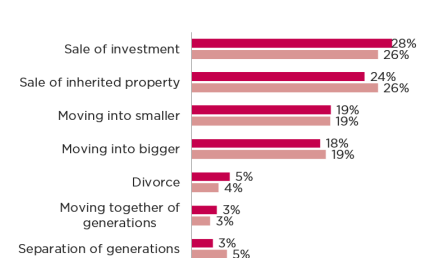
SELLERS' AGE IN THE COUNTRY



SELLERS' STATUS IN THE COUNTRY



MOTIVATION IN THE COUNTRY



AGE	AVERAGE PRICE	sq. m.
20 - 30	47 878 000	95
30 - 40	40 527 000	83
40 - 50	40 817 000	76
50 - 60	41 516 000	90
60 -	41 372 000	85

STATUS	AVERAGE PRICE	sq. m.
Employee	34 363 000	80
Top Manager	94 063 000	128
Manager	51 003 000	89
Pensioner	40 363 000	84
Entrepreneur	60 948 000	90

SITUATION	AVERAGE PRICE	sq. m.
Sale of investment	54 926 000	82
Separation of generations	55 635 000	104
Moving together of generations	39 838 000	81
Moving into smaller	48 983 000	110
Moving into bigger	44 184 000	74
Sale of inherited property	27 965 000	78
Divorce	47 226 000	78

■ April 2024 ■ April 2025

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. 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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