

DUNA HOUSE BAROMETER

The latest property market info
from Duna House network

Issue 181
July 2026



DHS
BÉT

**PRIME
MARKET**

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FORTHCOMING ISSUES

DATE OF ISSUE	CONTENT
14.09.2026	August 2026 data
14.10.2026	Q3 2026 data (with price indices and housing loan data)
12.11.2026	October 2026 data

Duna House Barometer is available from the 12th day of each month (forthcoming weekday if weekend) on the webpage: www.dh.hu/barometer

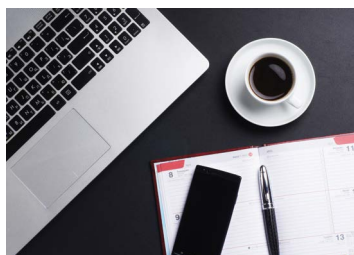
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GENERAL INFORMATION CONCERNING THE CONTENT OF THE PRESENT PUBLICATION

Please note: The present publication is not intended to be used to make estimates of the DH Group's business results or to draw conclusions regarding the same.

All data, information, estimates, and professional opinions contained in this publication are based on data derived from the activities of the Duna House Franchise Network and members of the DH Group, as well as, in certain cases, on subjective experience. Any extrapolation of these to the entire Hungarian residential property market may therefore require further adjustments.

Unless otherwise indicated specifically, all data were sourced from a database operated by the DH Group. This database is populated by members of our sales network based on their own judgment and the information provided by their clients; therefore, the operator assumes no responsibility for its completeness and accuracy. The data in this publication was compiled on the basis of residential property transaction parameters recorded by sales agents at Duna House offices operating nationwide, primarily in major cities.



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EXECUTIVE SUMMARY

SLUGGISH SUMMER MARKET, UNRELENTING SHIFT IN BUYERS' PROFILE

Among buyers in Budapest, the percentage of first-time buyers jumped from 12 per cent to 40 per cent in one year, while that of investors fell from 41 per cent to 27 per cent.

A year ago, it took 55 days to sell a concrete block home in Buda; today it takes up to 90 days - these units are selling more slowly than those in the country.

July's sales figures are stagnating year-on-year: the 9292 transactions are just 2.1 per cent below last year's figure.

In July 2026, the domestic housing market remained on the trajectory we had seen in the first half of the year. Sales volumes have essentially stagnated year-on-year; demand has been subdued, as is typical for the summer season; however, the shift in buyers' profile continues unabated.

According to Duna House estimates, 9292 residential properties changed owners in July. This is 5.8 per cent lower than the figure we saw in June, following the typical summer slowdown, but is only 2.1 per cent below the figure for July last year. Transaction volumes are therefore effectively stagnating on an annual basis - neither the temporary spike seen in March nor last year's trough is being repeated.

On the demand side, the picture remains guarded. The July demand index stood at 64 points, exactly where it had been in June, reflecting the seasonal lull of summer and falling short of July levels in previous years. Interest in the capital's districts has declined almost everywhere year-on-year, with District 13 remaining the most sought-after part of the capital.

The most striking message from the July figures is the shift in buyers' profile, which is now most evident when compared to the previous year. Among Budapest buyers, the percentage of first-time buyers has jumped from 12 per cent to 40 per cent in one year, while investment-driven purchases have fallen from 41 per cent to 27 per cent. Buyers have also become younger: the share of those aged 20-30 has doubled. The impact of the Otthon Start scheme, which has been around since the end of last summer, has not waned even during the summer months - this is most evident here when compared on a year-on-year basis.

This more price-sensitive group of buyers acquiring residential properties for their own use is also reshaping the way the market operates. The time it took to sell concrete block units in Budapest has become even longer: in Buda, the turnover speed of this category has risen from 55 days to 90 days in the space of a year. The situation for concrete block homes in the country has barely changed, meaning that what was once the fastest-selling segment in the capital now finds buyers much more slowly than its peers in the country. Buyers' bargaining power is strongest in the pre-owned brick-and-mortar market in the country, where price discounts hover at the 7 per cent level.

There has been no turnaround in price trends: prices per sq. m. have remained at the same high levels in both the capital and the country, while the quality of properties is best in Budapest and is more mixed in other parts of the country.

Overall, July was a continuation of the first half of the year: the market was being driven not by an increase in turnover, but by a shift in demand. Amid high price levels, younger buyers purchasing for their own use have taken the lead in the capital's market, whilst investors are gradually taking a back seat - the question for the coming months is how long this new balance will last.

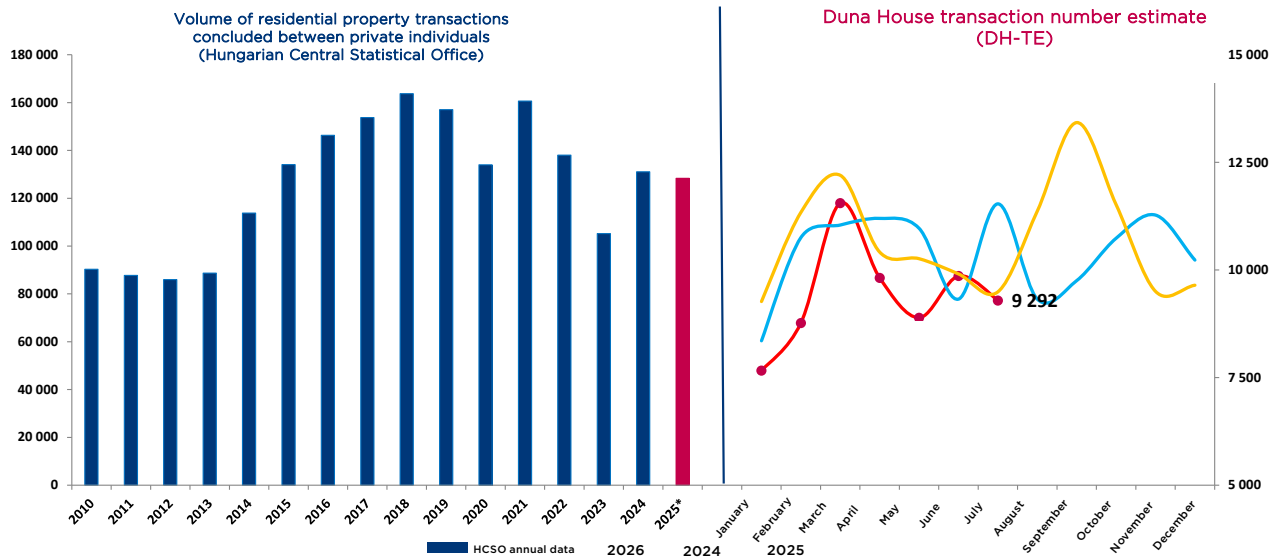
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TRANSACTION DATA

DUNA HOUSE TRANSACTION NUMBER ESTIMATE (DH-TE)

According to Duna House's transaction number estimate, 9292 residential properties changed owners nationwide in July 2026. This is 5.8 per cent lower than the June figure, reflecting the seasonal decline often seen during the summer months. On a year-on-year basis, transaction volumes have essentially stagnated: they are just 2.1 per cent below the figure for July last year. The market is therefore continuing along the trajectory we have seen in our half-yearly review – with high price levels and a subdued but stable demand.



According to data from Credipass, the financial brand of the Duna House Group, mortgage agreements for residential properties with a total contractual value of HUF 274 billion in Hungary are expected to have been concluded in July 2026. This volume is 2.9 per cent lower than the actual figures published by MNB, the National Bank of Hungary for June; however, compared with the level in July last year, it still represents a significant increase of 93 per cent.

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	9267	11 338	12 200	10 415	10 262	9908	9492	11369	13426	11518	9503	9646
2026	7662	8769	11,554	9815	8892	9862	9292					

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.

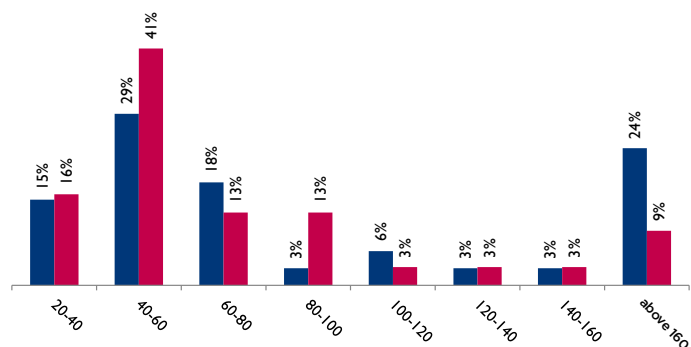
Please also note that DH-TE data cannot be used for defining the volume of transactions brokered by Duna House, or for estimating the business profit of Duna House Holding or for the drawing of any related conclusions.

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

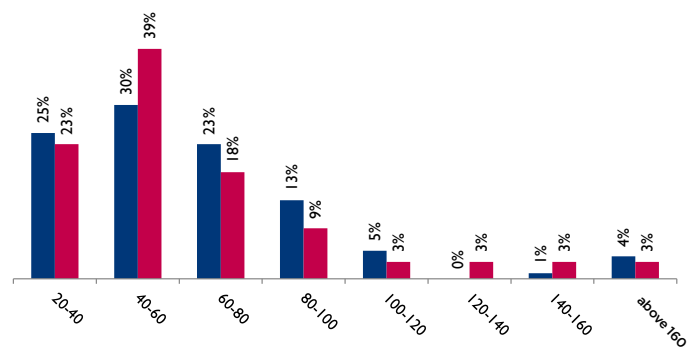
In both Buda and Pest, flats with a floor space of 40-60 sq. m. dominated the market, and their share continued to rise over the course of a year (from 29 per cent to 41 per cent in Buda and from 30 per cent to 39 per cent in Pest). In Buda, prices per sq. m. rose noticeably: the percentage of flats with a price per sq. m. north of HUF 2 million rose from 15 to 25 per cent, and the most expensive category – with purchase prices exceeding HUF 200 million – also expanded. In Pest, the most common residential unit price fell within the HUF 1.4-1.6 million per sq. m. range, while half of all purchase prices continued to fall within the HUF 40-70 million bracket.

BUDA

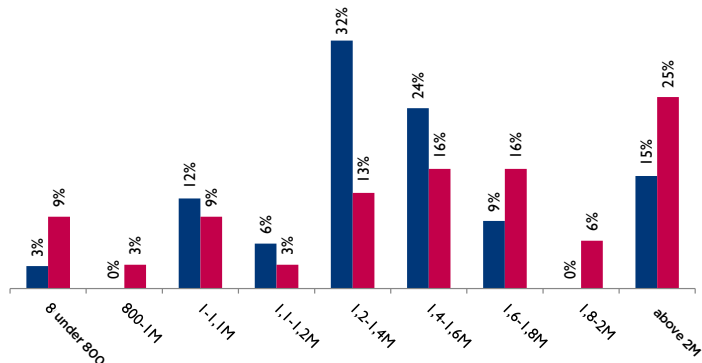


apartment size (m²)

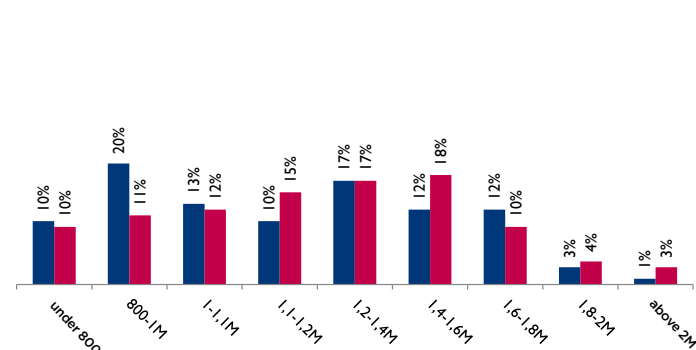
PEST



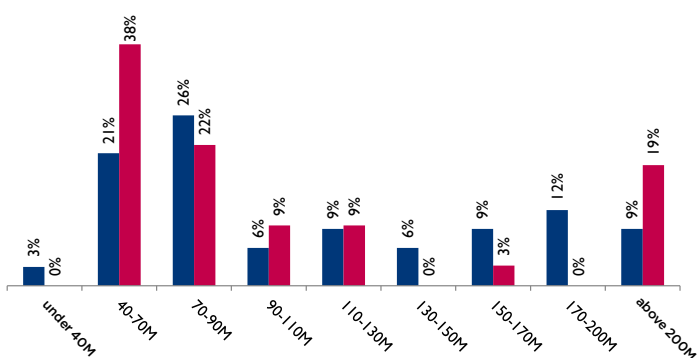
apartment size (m²)



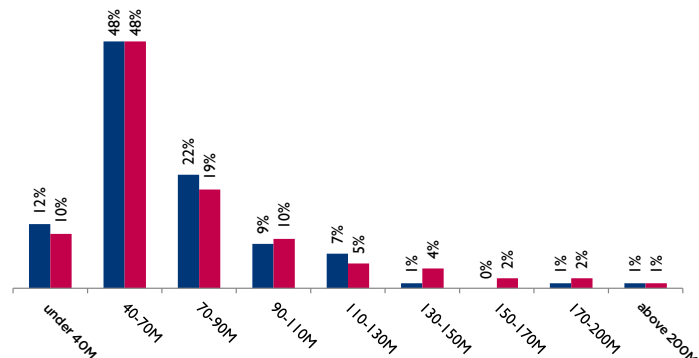
sq. m. price (in thousand HUF)



sq. m. price (in thousand HUF)



apartment price (in million HUF)



apartment price (in million HUF)

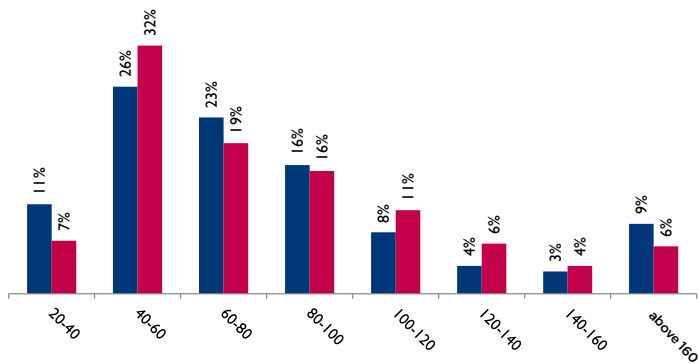
■ July 2025 ■ July 2026

Based on properties sold by Duna House Franchise Network.

TRANSACTION PARAMETERS IN THE COUNTRY

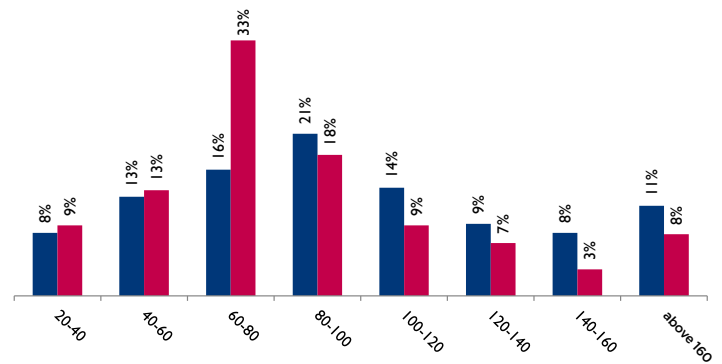
Excluding Central Hungary, flats measuring 40-60 sq. m. remained the best-selling category on the national market, with their share rising from 26 to 32 per cent. The upward shift in prices is reflected in the fact that the proportion of properties sold at a unit price exceeding HUF 1 million per sq. m. rose from 8 to 10 per cent over the course of a year. In County Pest, demand for larger flats, measuring 60-80 sq. m. strengthened (from 16 to 33 per cent), and the top price segment also expanded significantly — although the sample size for County Pest is small, so this trend should be interpreted with caution.

COUNTRYWIDE (EXCLUDING CENTRAL HUNGARY)

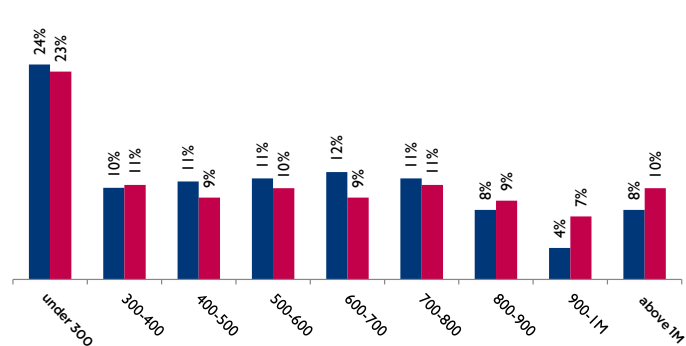


apartment size (m²)

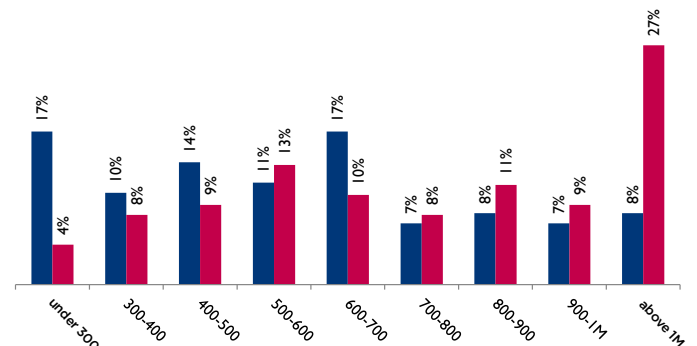
COUNTY PEST



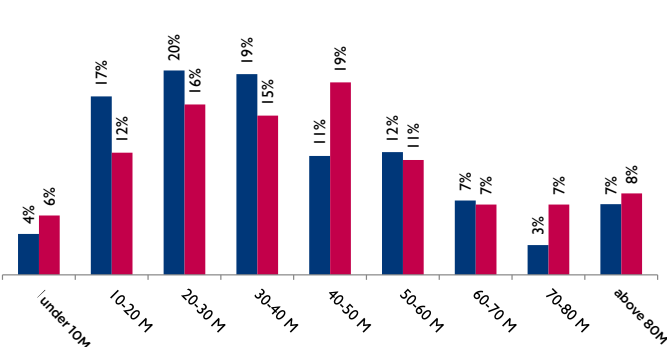
apartment size (m²)



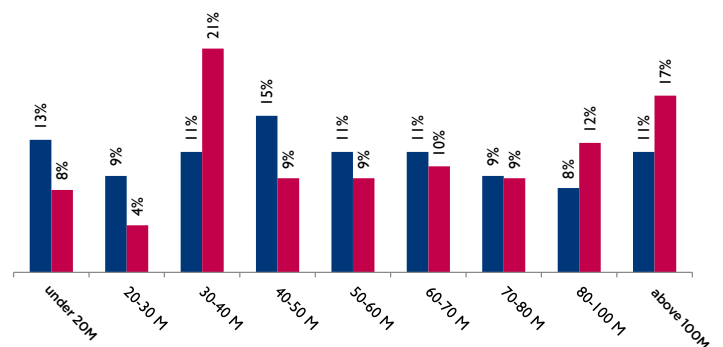
sq. m. price (in thousand HUF)



sq. m. price (in thousand HUF)



apartment price (in million HUF)



apartment price (in million HUF)

■ July 2025 ■ July 2026

Based on properties sold by Duna House Franchise Network.

SALES DATA – PRICES – BARGAINING MARGINS

In the market for concrete block homes, the price per sq. m. stood at around HUF 676,000 in the east and 798,000 forints in the west, while for brick-and-mortar homes it was HUF 424,000 in the east and HUF 525,000 in the west. In the capital, the price per sq. m. for concrete block units was HUF 1.24 million in Buda and HUF 1.13 million in Pest; for pre-owned brick and mortar properties it was HUF 1.54 million in Buda, HUF 1.37 million in the city centre and HUF 957,000 in Pest. We saw the greatest scope for buyer negotiation in the brick-and-mortar market in the country (around 7 per cent in both the east and in the west), while for concrete block flats in the capital it was around 4–5 per cent, and for brick-and-mortar homes in Pest around 4 per cent — this shows that buyers have the greatest room for negotiation when it comes to pre-owned homes in the country.

PANEL: COUNTRYWIDE

	EAST				WEST			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
July 2025	41 435 000	757 000	1%	4%	35 539 000	704 000	2%	4%
July 2026	36 684 000	676 000	2%	3%	42 805 000	798 000	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 2025	35 308 000	370 000	6%	6%	41 247 000	482 000	4%	6%
July 2026	33 836 000	424 000	4%	7%	47 512 000	525 000	2%	7%

PANEL: BUDAPEST

	BUDA				PEST			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
July 2025	64 080 000	1 257 000	9%	1%	60 935 000	1 081 000	1%	3%
July 2026	63 317 000	1 239 000	1%	4%	57 187 000	1 127 000	7%	3%

BRICK: BUDAPEST

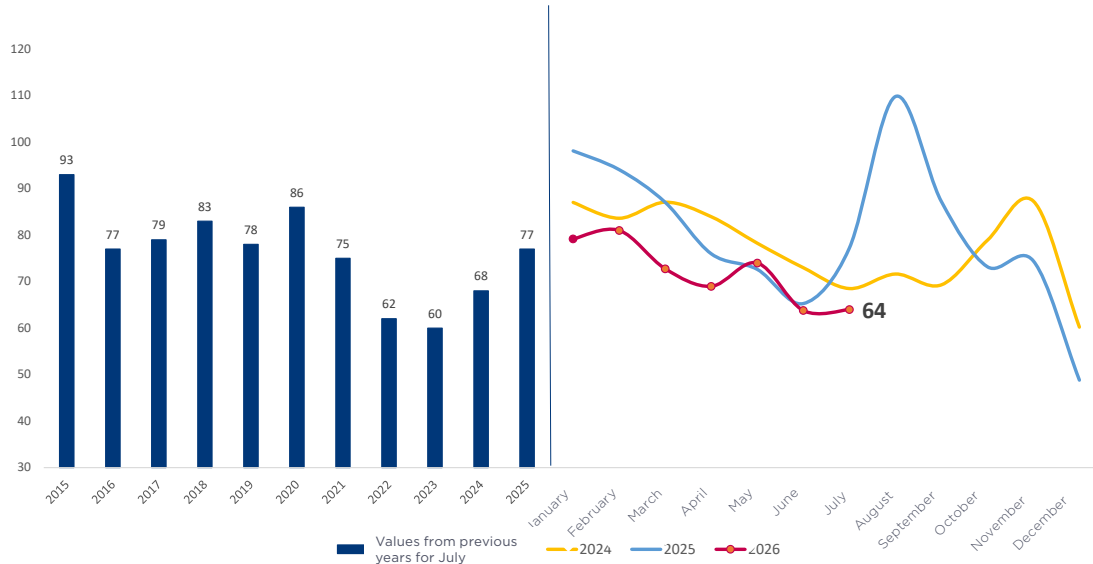
	BUDA				PEST				INNER CITY			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
July 2025	169 411 000	1 544 000	5%	2%	68 278 000	969 000	5%	4%	66 668 000	1 374 000	0%	6%
July 2026	132 104 000	1 541 000	7%	5%	68 461 000	957 000	6%	4%	91 603 000	1 372 000	6%	5%

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

Methodology: Changes in the average price may occur if more large-floor-plan apartments changed hands during a given period. Real price growth is reflected by the change in prices per square meter. 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

The Duna House demand index stood at 64 points in July, unchanged from June. This reflects the seasonal slowdown typical of the summer and is below the levels seen in July in previous years — above, but still close to, the lows of 2022-2023.

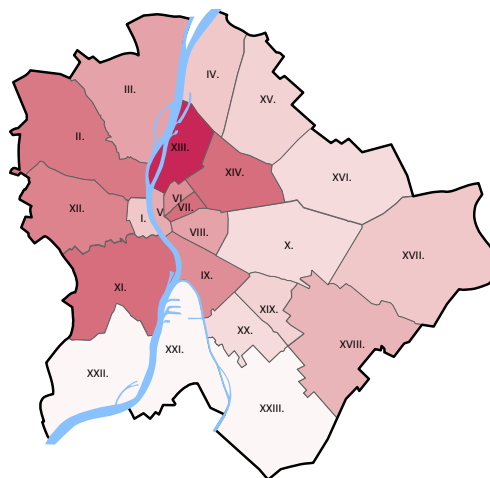


Methodology behind Demand Index: The basis of the estimate is the activity registered by our agents in various, mainly major cities and Duna House offices. Corrections are made depending on the number of active agents and working days. The Demand Index is an important indication of buyer side's reactions 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 terms of district popularity, District 13 remained the most sought-after (21.2 per cent), although its popularity has declined from last year's 23.1 per cent. Districts 11 (16.5) and 7 (16.3) occupy second and third place, respectively. Interest in most inner-city and Pest districts has fallen compared to a year ago, with the sharpest decline seen in District 6 (from 18.4 per cent to 13.9 per cent). One of the few districts to have seen an increase is District 17 (from 5.7 per cent to 8.1 per cent).

INTEREST TOWARD THE DISTRICTS IN BUDAPEST:



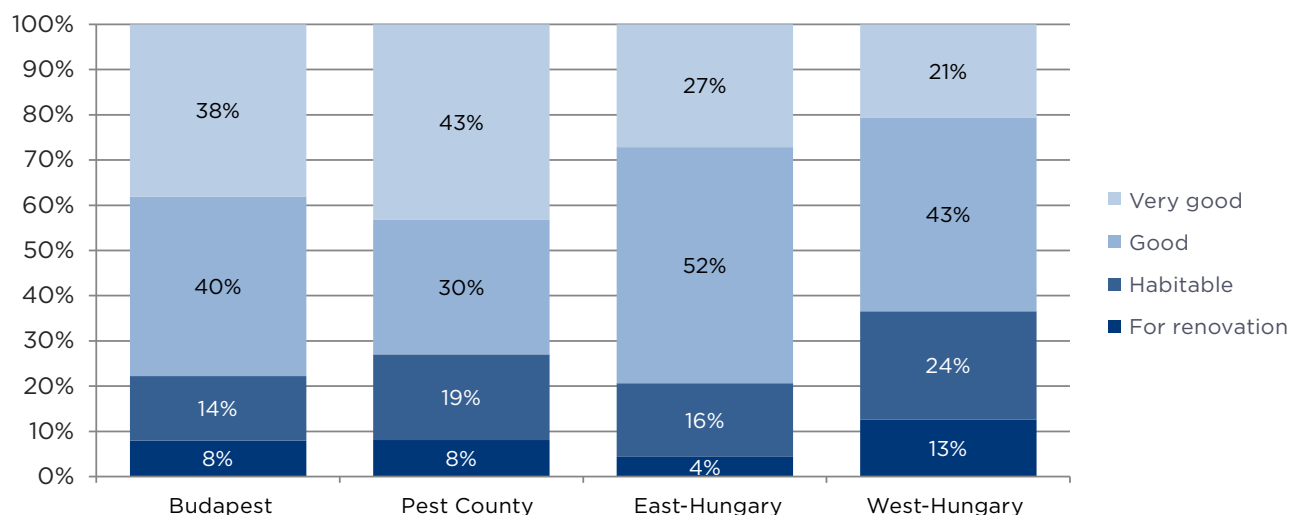
DISTRICT	JULY 2025	JULY 2026
Bp. 01.	8,9%	7,8%
Bp. 02.	17,6%	15,7%
Bp. 03.	12,6%	12,0%
Bp. 04.	6,7%	7,5%
Bp. 05.	11,5%	10,4%
Bp. 06.	18,4%	13,9%
Bp. 07.	17,6%	16,3%
Bp. 08.	14,3%	11,8%
Bp. 09.	15,4%	13,7%
Bp. 10.	7,5%	6,1%
Bp. 11.	18,3%	16,5%
Bp. 12.	14,7%	14,3%
Bp. 13.	23,1%	21,2%
Bp. 14.	19,0%	15,8%
Bp. 15.	7,0%	7,0%
Bp. 16.	7,7%	6,5%
Bp. 17.	5,7%	8,1%
Bp. 18.	9,5%	9,6%
Bp. 19.	9,2%	7,2%
Bp. 20.	5,9%	6,0%
Bp. 21.	3,1%	3,2%
Bp. 22.	4,3%	3,2%
Bp. 23.	3,6%	2,0%

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

We continue to see marked regional differences in the breakdown of flats sold by condition. The quality situation is best in Budapest: nearly four-fifths of sales fell into the 'good' (40 per cent) or 'very good' (38 per cent) categories, while the proportion of homes in need of renovation was just 8 per cent. In the country, the proportion of flats in poorer condition is higher — Western Hungary has the highest share of properties requiring renovation (13 per cent) and the lowest share in the 'very good' category (21 per cent). In the east, flats in 'good' condition dominate (52 per cent).



TURNOVER SPEED (TIME NEEDED TO SELL)

The markets of concrete block and brick-and-mortar homes are moving in opposite directions. Sales of concrete block units in the capital have slowed further: the average time to sell a flat has risen from 55 to 90 days in Buda and from 53 to 79 days in Pest over the course of a year. In contrast, the situation for concrete block homes outside Budapest has hardly changed (68 days in the east, 78 days in the west), meaning that these units in Budapest are now selling at a much slower rate than those outside the capital – a trend that became even more pronounced in July following the turnaround seen in the half-yearly figures. The picture is more mixed for pre-owned brick-and-mortar homes: the time it took to sell has shortened in the city centre of Budapest (from 85 to 78 days), while it became longer in the capital in general and in most brick-and-mortar markets in the country.

PANEL					
TIME NEED OF SALE (DAY)					
	EAST	WEST	BUDA	PEST	
July 2024	70	74	55	53	
July 2025	68	78	90	79	

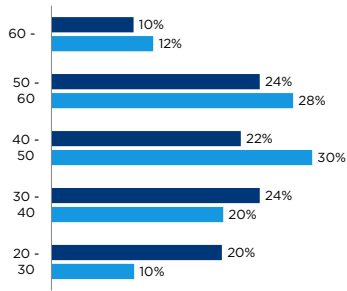
BRICK					
TIME NEED OF SALE (DAY)					
	EAST	WEST	BUDA	PEST	INNER CITY
July 2024	95	114	91	83	85
July 2025	104	106	100	95	78

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

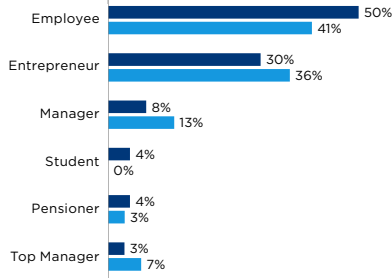
The buyer base in Budapest has undergone a dramatic transformation over the course of a year. The proportion of first-time buyers has jumped from 12 per cent in July last year to 40 per cent, while purchases for investment purposes have fallen from 41 per cent to 27 per cent, and the share of those moving into a larger flat has dropped from 22 per cent to 11 per cent. Buyers have also become younger: the proportion of 20-30-year-olds rose from 10 per cent to 20 per cent, and that of employees also increased (from 41 per cent to 50 per cent). Therefore, the impact of the Otthon Start scheme, which has been running for a year now, remained unbroken during the summer months – indeed, it has been most evident during this period when compared on a year-on-year basis.

BUYERS' AGE IN BUDAPEST



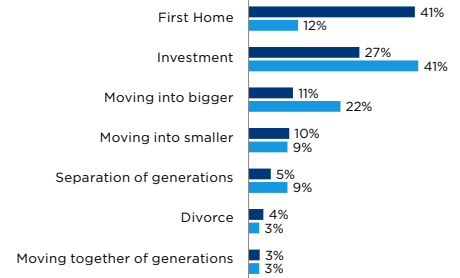
AGE	AVERAGE PRICE	m²
20 - 30	67 810 000	56
30 - 40	85 315 000	66
40 - 50	92 263 000	95
50 - 60	82 282 000	60
60 -	83 974 000	63

BUYERS' STATUS IN BUDAPEST



STATUS	AVERAGE PRICE	m²
Employee	75 978 000	65
Top Manager	76 167 000	63
Manager	91 243 000	86
Pensioner	68 225 000	49
Student	57 500 000	47
Entrepreneur	95 958 000	78

MOTIVATION IN BUDAPEST

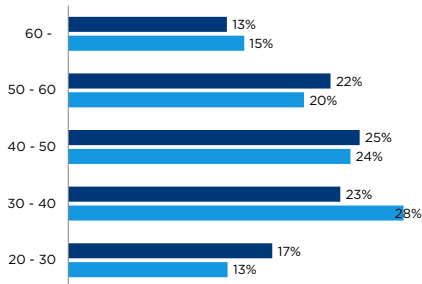


SITUATION	AVERAGE PRICE	m²
Investment	93 057 000	73
First Home	64 135 000	55
Separation of generations	63 997 000	45
Moving together of generations	69 000 000	97
Moving into smaller	86 341 000	63
Moving into bigger	136 284 000	140
Divorce	86 665 000	74

BUYER PROFILE IN THE COUNTRY

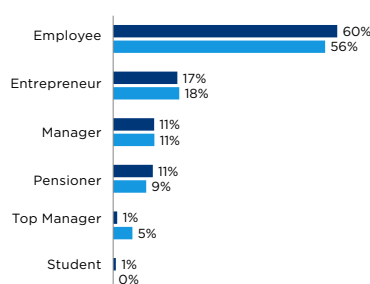
The profile of buyers in the regions outside Budapest is more stable than that in the capital. First-time buyers make up the largest group here, too (39 per cent); the proportion of investment purchases is around 20 per cent, whilst those moving into a larger property account for 21 per cent. In terms of occupational breakdown, employees represent the majority (60 per cent). In the country, therefore, the restructuring driven by the Otthon Start scheme is less dramatic, as the buyer base was already predominantly made up of those buying for their own use and employees.

BUYERS' AGE IN THE COUNTRY



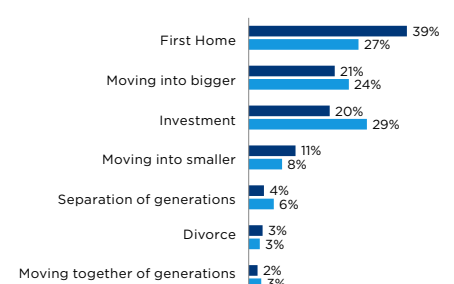
AGE	AVERAGE PRICE	m²
20 - 30	45 639 000	89
30 - 40	51 405 000	89
40 - 50	56 398 000	89
50 - 60	45 189 000	79
60 -	46 119 000	75

BUYERS' STATUS IN THE COUNTRY



STATUS	AVERAGE PRICE	m²
Employee	46 216 000	81
Top Manager	182 334 000	157
Manager	63 550 000	86
Pensioner	47 069 000	78
Student	26 750 000	55
Entrepreneur	50 421 000	83

MOTIVATION IN THE COUNTRY



SITUATION	AVERAGE PRICE	m²
Investment	35 005 000	61
First Home	43 971 000	81
Separation of generations	46 400 000	67
Moving together of generations	65 929 000	150
Moving into smaller	46 754 000	70
Moving into bigger	78 299 000	112
Divorce	37 164 000	88

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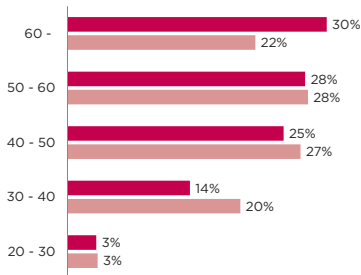
Under our methodology investment as a motivation includes all property transactions that, judged by the buyer's characteristics, can be considered as an investment, i.e. this is not a strictly business category. It includes all family investments and short-term investors who buy a property in a poor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

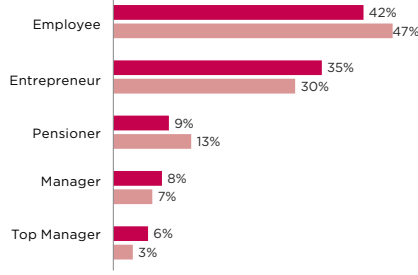
Among sellers in Budapest, the sale of a previous investment remained one of the key motivations, with its share rising slightly year-on-year (from 34 to 36 per cent). Sellers have become older: the share of those aged over 60 rose from 22 to 30 per cent, and the proportion of self-employed sellers has also increased. The sale of inherited properties (19 per cent) and moving into a larger flat (24 per cent) remained largely unchanged.

SELLERS' AGE BUDAPEST



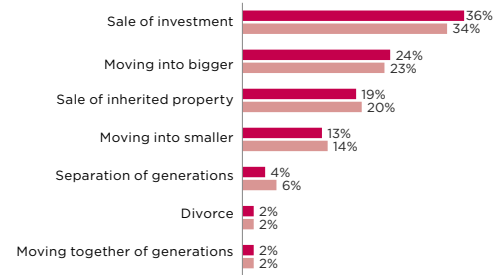
AGE	AVERAGE PRICE	m²
20 - 30	42 700 000	34
30 - 40	65 862 000	64
40 - 50	77 570 000	83
50 - 60	95 026 000	63
60 -	91 401 000	75

SELLERS' STATUS BUDAPEST



STATUS	AVERAGE PRICE	m²
Employee	62 666 000	64
Top Manager	125 758 000	71
Manager	89 096 000	65
Pensioner	107 800 000	100
Entrepreneur	92 970 000	69

MOTIVATION BUDAPEST

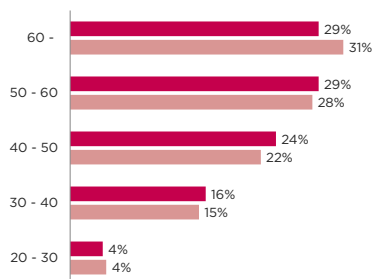


SITUATION	AVERAGE PRICE	m²
Sale of investment	94 927 000	66
Separation of generations	57 875 000	108
Moving together of generations	145 750 000	131
Moving into smaller	86 043 000	83
Moving into bigger	68 525 000	49
Sale of inherited property	67 960 000	79
Divorce	115 500 000	97

SELLER PROFILE IN THE COUNTRY

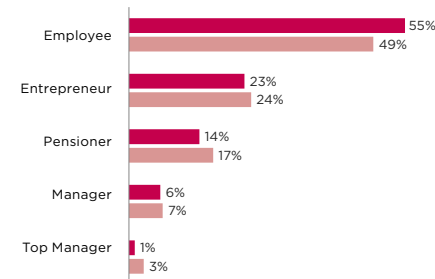
Among sellers in the country, the sale of previous residential property investments (28 per cent) and the sale of inherited properties (23 per cent) were the two largest categories, followed by moving into a larger home (20 per cent) and moving into a smaller home (17 per cent). Overall, sellers in the country are less investment motivated than those in Budapest.

SELLERS' AGE IN THE COUNTRY



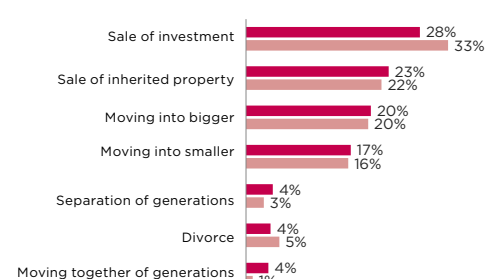
AGE	AVERAGE PRICE	m²
20 - 30	47 989 000	75
30 - 40	47 172 000	78
40 - 50	50 806 000	86
50 - 60	50 417 000	84
60 -	45 044 000	88

SELLERS' STATUS IN THE COUNTRY



STATUS	AVERAGE PRICE	m²
Employee	44 432 000	84
Top Manager	59 967 000	72
Manager	61 266 000	77
Pensioner	47 821 000	95
Entrepreneur	56 758 000	84

MOTIVATION IN THE COUNTRY



SITUATION	AVERAGE PRICE	m²
Sale of investment	52 056 000	77
Separation of generations	54 575 000	86
Moving together of generations	63 565 000	96
Moving into smaller	65 620 000	115
Moving into bigger	49 349 000	75
Sale of inherited property	34 133 000	84
Divorce	61 346 000	106

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