

DUNA HOUSE BAROMETER

The latest property market info
from Duna House network

Issue 154
April 2024



DHS
BÉT

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MARKET**

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FORTHCOMING ISSUES

DATE OF ISSUE	CONTENT
12.06.2024	May 2024 data
12.07.2024	Q2 2024 data (including price indices and housing loan data)
12.08.2024	July 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 CONTINUES TO RECOVER WITH ACTIVE DEMAND AND INCREASING TRANSACTION NUMBERS

According to the Duna House Demand Index, interest in the property market remains stable in the second quarter. As for the number of transactions, the market continued to pick up, albeit at a slower pace. With 11,200 transactions estimated for April, the segment closed the strongest month of the year so far, representing a significant increase of 65% compared to April last year. In the mortgage market, volume growth continued at an increasing pace, with data from Credipass, the international financial brand of the Duna House Group in Hungary showing that in April this year HUF 105 billion of residential mortgage loans were contracted, the highest since June 2022 seen as a result of the Green Home Programme that was part of NHP, the Growth Loan Programme. The April figure represents an increase of 170% compared to the same period last year and 7% compared to the just published figure for the previous month.

As interest increased, prices per square metre continued to rise in both the country and in the capital. The average price per sq. m. of concrete block units in the countryside ranged from HUF 534-587,000 per sq. m., while brick and mortar homes were available for HUF 350,000 per sq. m. in the East and HUF 365,000 per sq. m. in the West of the country. The average price per sq. m. for a concrete block apartment in the capital was HUF 962,000 in Buda and HUF 791,000 in Pest. Compared to April last year, the average price per sq. m. of brick and mortar apartments has also increased in all parts of the country this year, except in the districts of Pest, so those planning to buy a brick and mortar home in the capital can expect to pay between HUF 713,000 and HUF 1.1 million, depending on the location.

This month, Budapest property buyers also opted for homes with a floor space of 40-60 sq. m, but smaller apartments between 20-40 sq. m. in size were also in demand in Pest. Among the transactions closed in April with the help of Duna House, almost every second property in Buda was worth over HUF 70 million, while in the Pest districts there was more demand for apartments priced between HUF 40-50 million. Regarding the preferred location, demand for District 13 increased in April 2024, with the majority (18.4 %) of buyers in the capital naming Angyalföld (District 13) as their preferred district when looking for a new home. In terms of popularity, Újbuda (District 11) came in second place. District 6 (Terézváros) and District 7 (Erzsébetváros), the most popular inner city districts among investors, were ranked third and fifth respectively in the Duna House inter-district popularity survey.

Compared to the capital, the residential property market of the Budapest conurbation and of the country still offers a more affordable alternative for home buyers, as evidenced by the change in average property values in addition to the price per sq. m. Nevertheless, according to transaction data, more than a quarter of all properties sold nationwide (except in Central Hungary) were worth over HUF 40 million, while in County Pest, homes worth over HUF 50 million already accounted for half of all sales.

In Budapest, the main buyer motivation at 32% was making an investment, and the share of first-time buyers was also high at 28%. On average, customers spent HUF 62.5 million on property investments and HUF 47.2 million on their first home. First home buyers were also active in the country, with more than a 25% of all sales in April sharing this motivation, but the majority of buyers were moving into larger properties. In the country, buyers spent an average of HUF 30.8 million on their first home and HUF 52.4 million on a larger home. An analysis of sellers' motivation shows that in Budapest moving to a larger property was the overwhelming reason for the sale, and another 16% of owners in the capital were parting with their inheritance in April this year. In the country, the share of main reasons for selling were the same: 26% of sellers each were selling an inherited property or a previous property investment.

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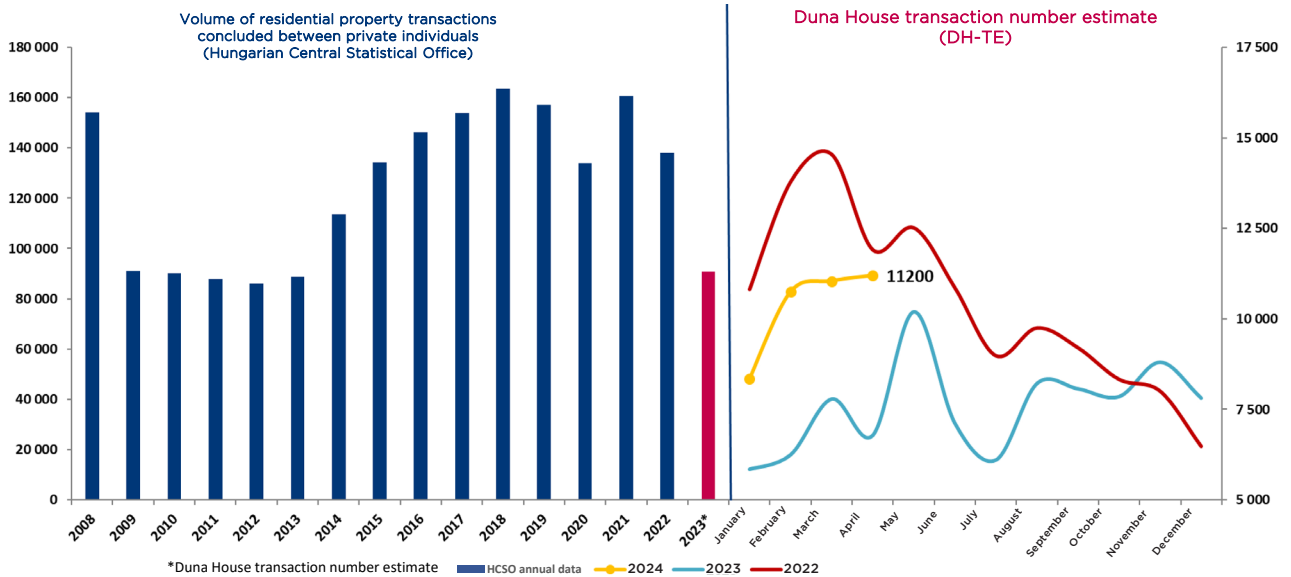
THREE INTERESTING FACTS

- **The Hungarian residential property market closed its strongest month of the year in April with 11,200 transactions.**
- **In April, half of the properties sold in County Pest were worth over HUF 50 million.**
- **According to Credipass, HUF 105 billion in contracted residential mortgage loans were realised in April.**

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 11,200 residential property transactions were concluded in April 2024 and residential mortgage contracts worth HUF 105 billion were signed in the whole of Hungary.



The real estate market continued its upward trend at a slower pace in the first month of the second quarter, with Duna House estimating 11,200 transactions for April, the strongest month of the year so far. This figure shows a rise of only 1% compared to the previous month, but a significant increase of 65% compared to April last year.

As far as the mortgage market is concerned, volume growth continued at an increasing pace, with data from Credipass, the international financial brand of the Duna House Group in Hungary showing that in April this year, HUF 105 billion of loans were contracted. The April figure represents an increase of 170% compared to the data published by the National Bank of Hungary for the same period last year and 17% compared to the previous month.

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

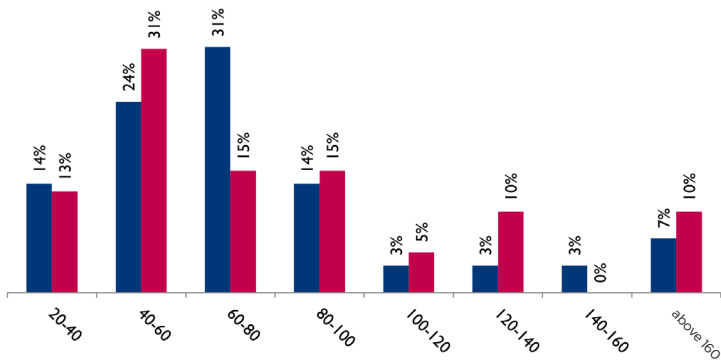
	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
2021	11 185	14 569	15 630	13 511	14 198	13 615	11 185	11 304	11 807	11 526	11 022	11 422
2022	10 815	13 793	14 548	11 911	12 519	10 859	8 978	9 748	9 200	8 326	8 000	6 474
2023	5 853	6 253	7 787	6 787	10 187	7 120	6 107	8 213	8 067	7 853	8 800	7 813
2024	8 354	10 754	11 045	11 200								

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

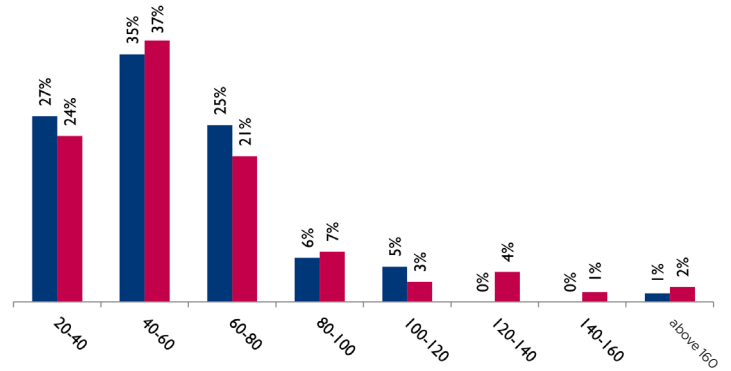
Among the real estate transactions in Budapest in April 2024, properties with a floor space of 40-60 sq. m. accounted for 31% on the Buda side. The majority (23%) of homes sold in the area changed hands for between HUF 900,000 and HUF 1 million per sq. m. In Buda, the majority, 46%, of homes were sold at prices north of HUF 70 million. In Pest, on the other side of the Danube, demand also favoured mainly apartments of 40-60 sq. m. (37%), but a significant share, 24% of buyers also preferred properties with a floor space of 20-40 sq. m. 35% of contracts were concluded at prices ranging between HUF 600-800 thousand per sq. m., while in the districts of Pest the most common price range in April was HUF 40-50 million with a share of 29%.

BUDA

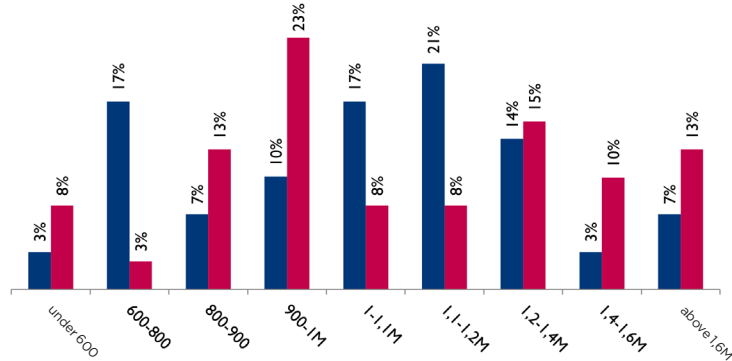


apartment size (m²)

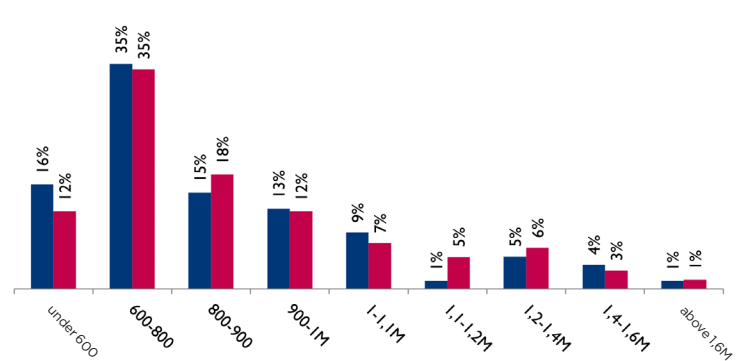
PEST



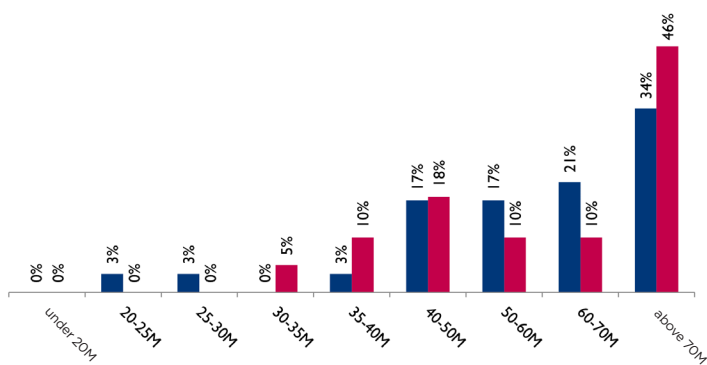
apartment size (m²)



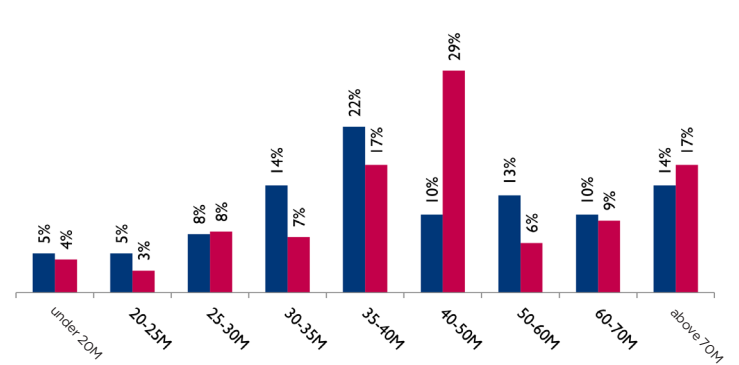
sq. m. price (in thousand HUF)



sq. m. price (in thousand HUF)



apartment price (in million HUF)



apartment price (in million HUF)

■ April 2023 ■ April 2024

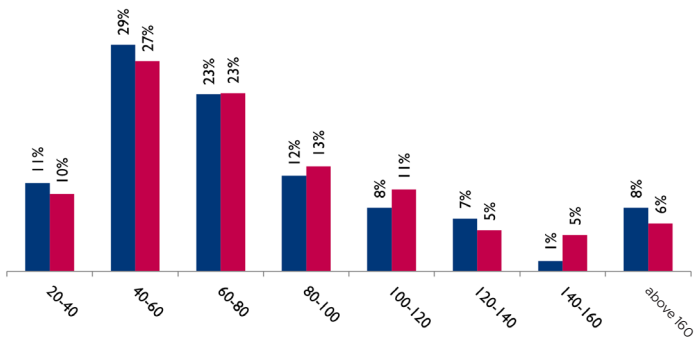
Based on properties sold by Duna House Franchise Network.

TRANSACTION PARAMETERS IN THE COUNTRY

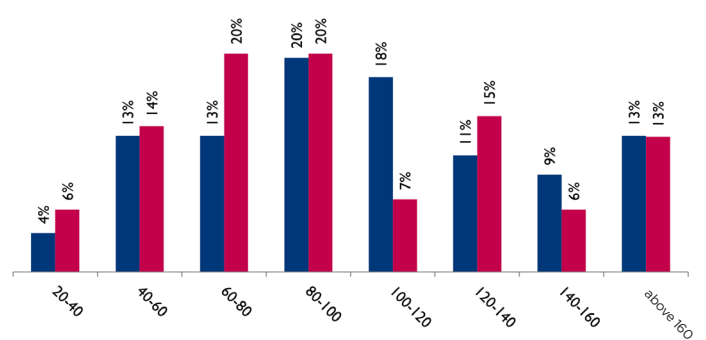
In April 2024, similarly to the capital and with the exception of Central Hungary, buyers nationwide preferred properties between 40-60 sq. m. (27%), while 23% of transactions fell in the 60-80 sq. m. category. 27% of properties that went to a new owner were in the under HUF 250,000 per sq. m. bracket, while 23% of transactions closed at prices north of HUF 600,000 per sq. m. In the country, the majority (27%) of transactions in April 2024 closed at prices above HUF 40 million. In County Pest, the proportion of clients who opted for properties with a floor space between 60-80 and 80-100 sq. m. was equal at 20% each. In terms of price per sq. m., one third of all sales were in the category above HUF 600,000, but the share of properties priced above HUF 50 million increased significantly, by 14 percentage points, with half of all sales falling in this price range.

COUNTRYWIDE (EXCLUDING CENTRAL HUNGARY)

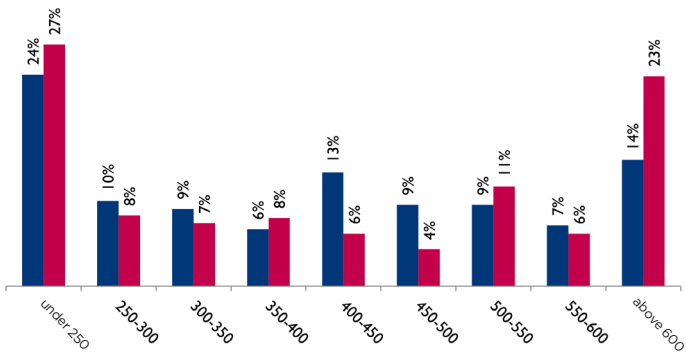
COUNTY PEST



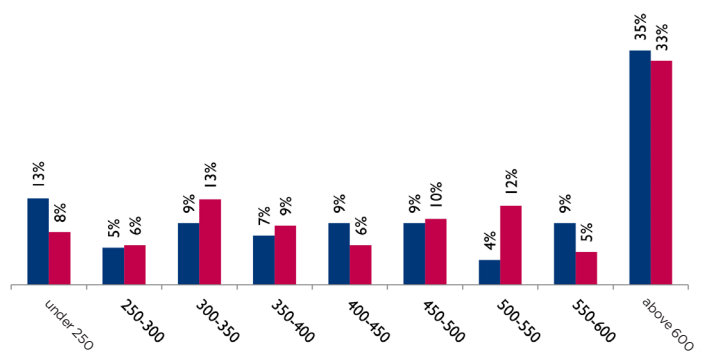
apartment size (m²)



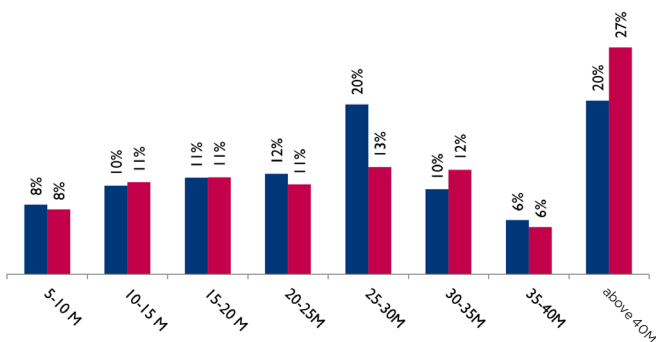
apartment size (m²)



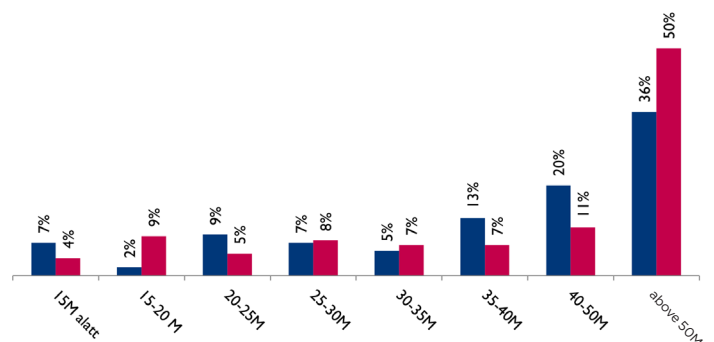
sq. m. price (in thousand HUF)



sq. m. price (in thousand HUF)



apartment price (in million HUF)



apartment price (in million HUF)

■ April 2023 ■ April 2024

Based on properties sold by Duna House Franchise Network.

SALES DATA - PRICES - BARGAINING MARGINS

The rise in house prices continued both in the country and in the capital as interest increased. The average price per sq. m. of a concrete block unit in eastern Hungary rose to HUF 587,000 while in Western areas the average price per sq. m. of a concrete block home was HUF 534,000 in April 2024. In the country, buyers bought concrete block homes following a 5-7% bargain; sellers in the East were not reducing the asking price during the advertising phase, while in the West the it was generally lowered by 5%. The average price per sq. m. of brick and mortar homes also increased compared to the same period last year: homes were priced at HUF 350,000 per sq. m. in the East and HUF 365,000 per sq. m. in the West. This type of property also saw a 4-5% downward change in the asking price, followed by a 6-7% reduction during the bargaining phase.

PANEL: COUNTRYWIDE

	EAST				WEST			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
April 2023	26 800 000	469 000	4%	6%	27 554 000	482 000	2%	6%
April 2024	29 577 000	587 000	0%	5%	27 700 000	534 000	5%	7%

BRICK: COUNTRYWIDE

	EAST				WEST			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
April 2023	25 323 000	339 000	6%	8%	30 478 000	305 000	3%	8%
April 2024	30 264 000	350 000	4%	6%	31 530 000	365 000	5%	7%

The average price per sq. m. also increased for concrete block homes in the capital, with prices rising to HUF 962,000 in Buda and HUF 791,000 in Pest in April this year. In Budapest, owners of concrete block homes have uniformly reduced the price by only 1% during the advertising phase. On the Buda side, there was no space for a buyer's bargain, while on the Pest side, buyers had a 4% margin to shave off the asking price. The average price per sq. m. of brick and mortar homes rose in all but the Pest districts in April this year. In Buda, owners reduced their asking price by 8%, in Pest by 4%, while in the city centre it was 5%. Buyers' bargains in the Buda districts were just 4%, while sellers in Pest and in the downtown areas conceded 5% based on April 2024 transactions.

PANEL: BUDAPEST

	EAST				WEST			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
April 2023	53 950 000	800 000	5%	5%	38 231 000	701 000	4%	3%
April 2024	45 955 000	962 000	1%	0%	40 639 000	791 000	1%	4%

BRICK: BUDAPEST

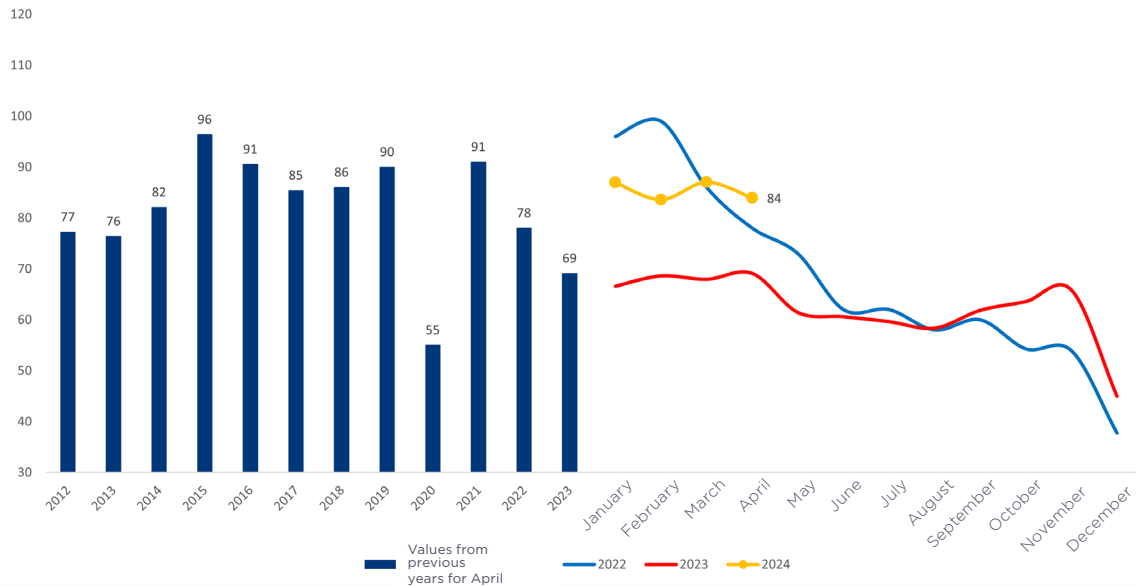
	BUDA				PEST				INNER CITY			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
April 2023	73 855 000	919 000	4%	5%	46 818 000	822 000	4%	5%	55 338 000	858 000	4%	5%
April 2024	102 296 000	1 110 000	8%	4%	49 000 000	713 000	4%	5%	53 127 000	945 000	5%	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

Based on the first month of the second quarter, the Duna House Demand Index is holding steady. The number of working days in April is the only reason why the index is 3 points lower than in the previous month, at 84 points, which is just about the same as it was in January 2024.

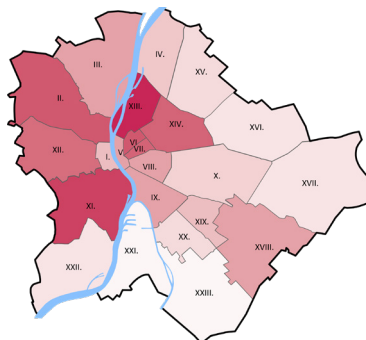


Methodology behind Demand Index: The basis of the estimate is the activity registered by our agents in various, mainly major cities and Duna House offices. Corrections are made depending on the number of active agents and working days. The Demand Index is an important indication of buyer side's reactions 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 2024, the demand for District 13 increased, with the majority (18.4%) of property buyers in the capital indicating Angyalföld (District 13) as their preferred district when looking for property. In terms of popularity, Újbuda (District 11) came in second place, while Terézváros (District 6) received the third highest number of enquiries, according to the popularity survey of Duna House.

INTEREST TOWARD THE DISTRICTS IN BUDAPEST:



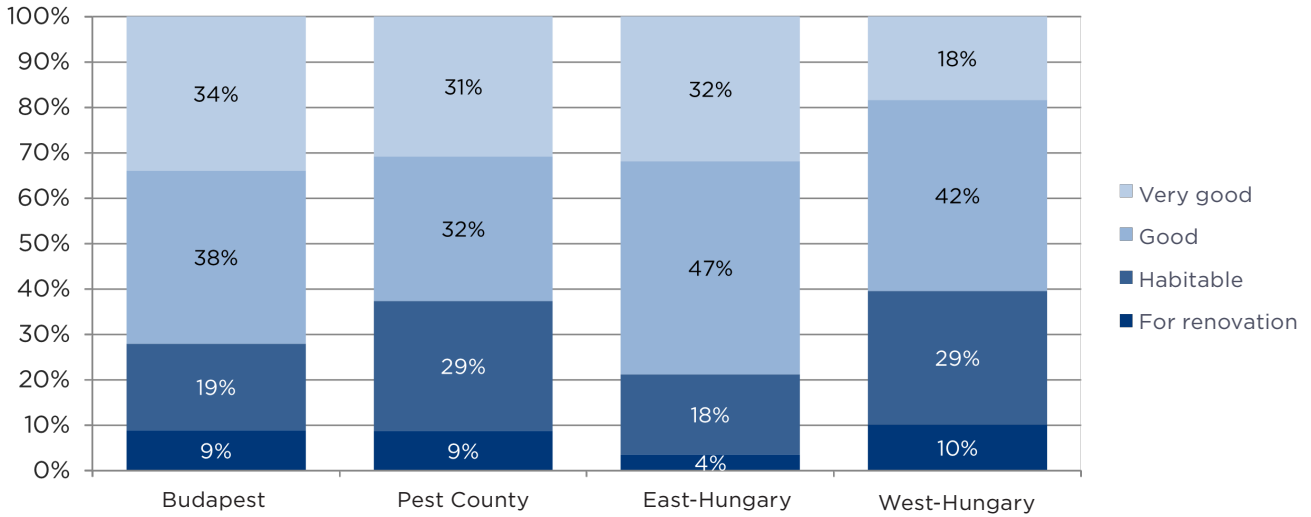
DISTRICT	APRIL 2023	APRIL 2024
Bp. 01.	8,3%	8,0%
Bp. 02.	15,3%	15,5%
Bp. 03.	11,5%	10,3%
Bp. 04.	8,7%	7,3%
Bp. 05.	9,4%	10,0%
Bp. 06.	13,5%	15,8%
Bp. 07.	12,7%	14,9%
Bp. 08.	10,1%	10,0%
Bp. 09.	9,6%	10,4%
Bp. 10.	4,6%	6,8%
Bp. 11.	17,0%	17,0%
Bp. 12.	11,3%	14,0%
Bp. 13.	17,4%	18,4%
Bp. 14.	12,7%	14,9%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

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

Based on April 2024 sales data, buyers nationwide preferred properties in a good condition. With the exception of West Hungary, where properties in a “good” condition were followed by those in a “habitable” repair, the second most sought-after category nationally was “very good”. According to Duna House sales data, the proportion of properties to be renovated was lowest in the East, at 4%, while the propensity to renovate rose to 10% in the West. In the capital and in County Pest, homes to be renovated accounted for 9% of transactions in both regions in April.



TURNOVER SPEED (TIME NEEDED TO SELL)

Based on April sales data, apartments in the country changed hands fastest, in almost 3 months, but it could take up to 3.6 months to sell a concrete block apartment in the capital. At the same time, sales of brick and mortar properties continued to drag on across the country. The longest time, 4.6 months, was needed to sell flats on the Buda side of the capital, while in Pest and in the downtown districts, as well as in the East and West, transactions took nearly 4 months to close.

PANEL				
TIME NEED OF SALE (DAY)				
	EAST	WEST	BUDA	PEST
April 2023	72	77	85	65
April 2024	86	93	114	104

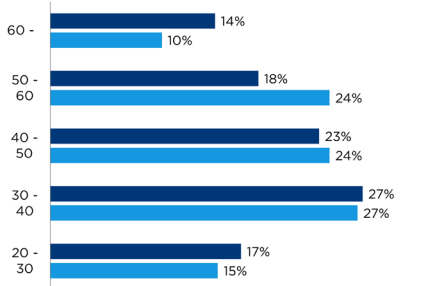
BRICK					
TIME NEED OF SALE (DAY)					
	EAST	WEST	BUDA	PEST	INNER CITY
April 2023	143	131	112	102	130
April 2024	118	121	138	117	117

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

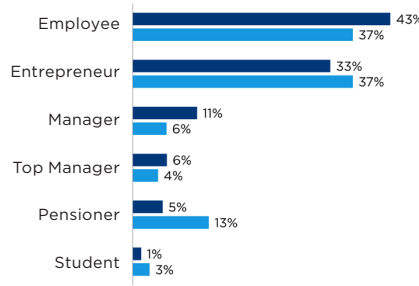
In the capital, 27% of property buyers were in the 30-40 age group, but those aged 40-50 were also active in April this year with a share of 23%. 43% of buyers in Budapest were employees and a third of them were self-employed. The main motivation for buying was making an investment (32%), but the proportion of first-time buyers was also high (28%). On average, clients spent HUF 62.5 million on an investment and HUF 47.2 million on their first home.

BUYERS' AGE IN BUDAPEST



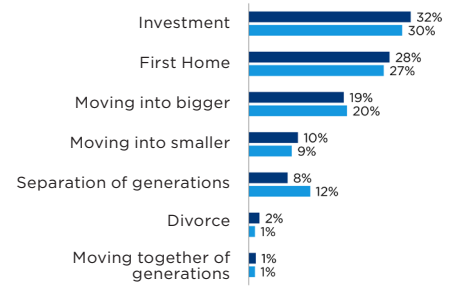
AGE	AVERAGE PRICE	m ²
20 - 30	37 308 000	43
30 - 40	64 660 000	74
40 - 50	62 538 000	67
50 - 60	51 559 000	60
60 -	56 024 000	67

BUYERS' STATUS IN BUDAPEST



STATUS	AVERAGE PRICE	m ²
Employee	44 950 000	52
Top Manager	84 875 000	78
Manager	61 487 000	81
Pensioner	50 700 000	59
Student	36 250 000	48
Entrepreneur	74 798 000	89

MOTIVATION IN BUDAPEST

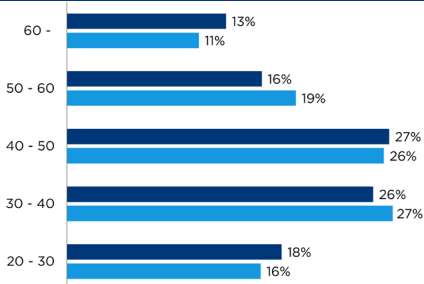


SITUATION	AVERAGE PRICE	m ²
Investment	62 567 000	78
First Home	47 266 000	52
Separation of generations	39 637 000	53
Moving together of generations	124 250 000	116
Moving into smaller	50 304 000	57
Moving into bigger	82 383 000	82
Divorce	99 667 000	115

BUYER PROFILE IN THE COUNTRY

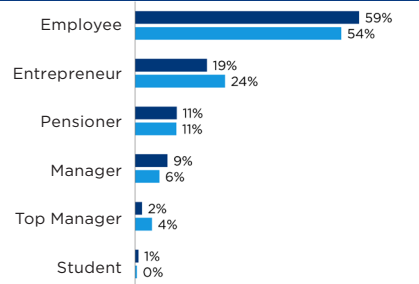
According to transaction data from the country, the most active buyers were aged 40-50 with a 27% share in April this year, but the 30-40 age group was also present with an almost equal share (26%). 59% of buyers in the country were employees and moving into a larger property (30%) or buying a first home (26%) were their main motivations. Those buying their first home and moving into a larger home spent HUF 30.8 million and HUF 52.4 million on average, respectively.

BUYERS' AGE IN THE COUNTRY



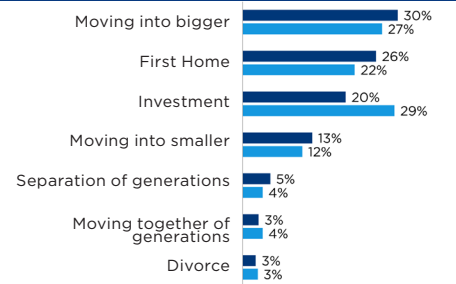
AGE	AVERAGE PRICE	m ²
20 - 30	34 617 000	90
30 - 40	39 289 000	95
40 - 50	41 648 000	87
50 - 60	38 481 000	80
60 -	34 133 000	71

BUYERS' STATUS IN THE COUNTRY



STATUS	AVERAGE PRICE	m ²
Employee	33 882 000	87
Top Manager	78 900 000	152
Manager	44 218 000	91
Pensioner	32 782 000	67
Student	31 834 000	95
Entrepreneur	47 902 000	93

MOTIVATION IN THE COUNTRY



SITUATION	AVERAGE PRICE	m ²
Investment	27 539 000	67
First Home	30 858 000	80
Separation of generations	29 913 000	69
Moving together of generations	68 741 000	161
Moving into smaller	31 038 000	62
Moving into bigger	52 482 000	115
Divorce	26 917 000	73

■ April 2023 ■ April 2024

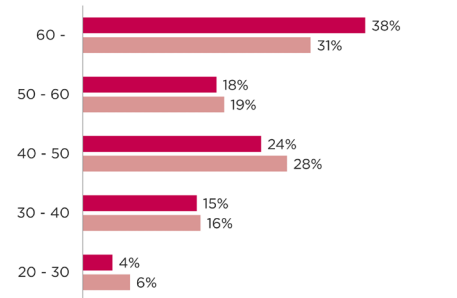
Under our methodology investment as a motivation includes all property transactions that, judged by the buyer's characteristics, can be considered as an investment, i.e. this is not a strictly business category. It includes all family investments and short-term investors who buy a property in a poor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

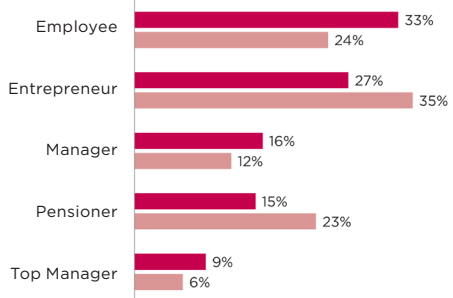
According to April sales data from Duna House, the majority of sellers in the capital were over 60 years old, accounting for 38% of transactions. 33% of sellers were employees and 27% were self-employed. The proportion of those selling their previous property investment fell by 6 percentage points to 38% compared to the same period last year. 26% of sellers sold their home to move into a larger property and 16% of owners were selling their inheritance in the capital in April this year.

SELLERS' AGE BUDAPEST



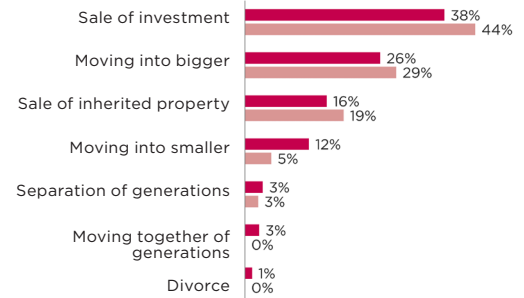
AGE	AVERAGE PRICE	m ²
20 - 30	46 277 000	47
30 - 40	48 052 000	60
40 - 50	64 050 000	71
50 - 60	78 692 000	83
60 -	52 195 000	61

SELLERS' STATUS BUDAPEST



STATUS	AVERAGE PRICE	m ²
Employee	43 780 000	54
Top Manager	87 100 000	82
Manager	59 513 000	65
Pensioner	57 436 000	69
Entrepreneur	65 279 000	87

MOTIVATION BUDAPEST

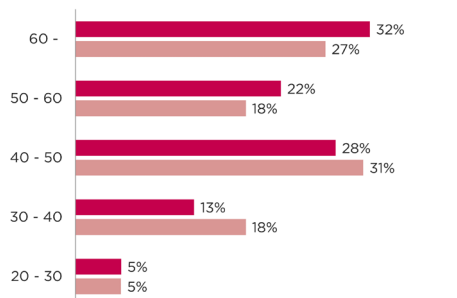


SITUATION	AVERAGE PRICE	m ²
Sale of investment	63 253 000	69
Separation of generations	91 900 000	81
Moving together of generations	47 400 000	53
Moving into smaller	67 712 000	98
Moving into bigger	49 182 000	55
Sale of inherited property	50 185 000	69
Divorce	64 500 000	61

SELLER PROFILE IN THE COUNTRY

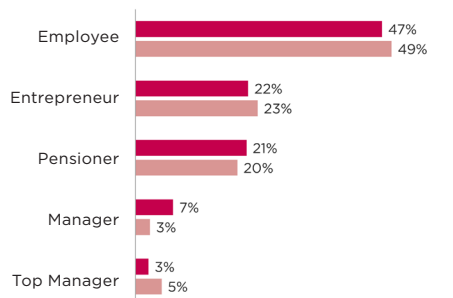
Among the owners of properties sold in the country with the help of Duna House, 32% were over 60 years old. 47% of sellers were employees, and the main reasons for selling were selling an inherited property and cashing in on a previous property investment, with an equal share of 26-26%.

SELLERS' AGE IN THE COUNTRY



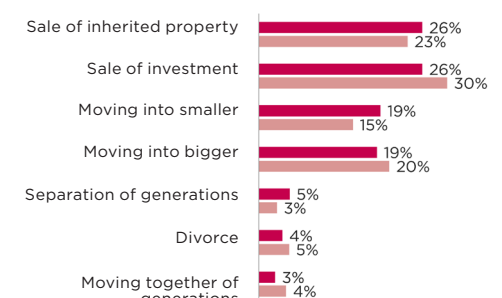
AGE	AVERAGE PRICE	m ²
20 - 30	29 925 000	100
30 - 40	32 368 000	82
40 - 50	37 564 000	87
50 - 60	31 266 000	80
60 -	37 502 000	88

SELLERS' STATUS IN THE COUNTRY



STATUS	AVERAGE PRICE	m ²
Employee	32 458 000	85
Top Manager	44 913 000	134
Manager	52 828 000	90
Pensioner	31 054 000	84
Entrepreneur	46 870 000	89

MOTIVATION IN THE COUNTRY



SITUATION	AVERAGE PRICE	m ²
Sale of investment	41 677 000	83
Separation of generations	40 975 000	111
Moving together of generations	37 184 000	71
Moving into smaller	38 817 000	106
Moving into bigger	41 158 000	77
Sale of inherited property	27 425 000	85
Divorce	49 904 000	98

■ April 2023 ■ April 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 woman in a white blazer is looking at a smartphone. The table is cluttered with documents, a laptop, a tablet, a ruler, and a pen. The background is a light-colored wall.

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