

# DUNA HOUSE BAROMETER

The latest property market info  
from Duna House network

**Issue 183**  
**Q3 2026**  
**and September 2026**



## DHS



**PRIME  
MARKET**

Listed on the Prime Market of  
the Budapest Stock Exchange



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## FORTHCOMING ISSUES

| DATE OF ISSUE | CONTENT                                                      |
|---------------|--------------------------------------------------------------|
| 12.11.2026    | October 2026 data                                            |
| 14.12.2026    | November 2026 data                                           |
| 14.01.2027    | Q4 2026 data (including price indices and housing loan 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.**

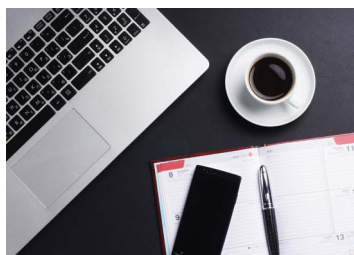
**All data, information, estimates and professional statements presented in the publication are developed based on data gained from the activities of Duna House Holding members,** or in some cases are based on subjective experience. Application of those for the entire Hungarian property market may require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

For newly built apartment market data our cooperating partner is ELTINGA Property Market Research Centre and ECRS Hungary Kft, the compilers of the Budapest Property Market Report.

[www.eltinga.hu](http://www.eltinga.hu)





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## EXECUTIVE SUMMARY

### RESIDENTIAL PROPERTY PRICES HAVE STALLED, SELLERS OFFER DEEPER DISCOUNTS

In Budapest, the residential property price index fell by 2 per cent for both main categories over the course of a quarter. The price level of brick-and-mortar homes in the capital is now even lower than it was in the third quarter of last year.

For brick-and-mortar homes in the country, the bargaining margin has roughly doubled over the course of a year. In the east, it rose from 3.5 per cent to 6.5 per cent, and in the west from 3.4 per cent to 7.1 per cent.

The average time it took to sell concrete block units in Buda increased from 55 days to 101 days over the course of a year. A year ago, this was the fastest-selling segment in the country.

In the third quarter of the year, the residential property price index fell nationwide, and sales volumes were lower than a year earlier.

Based on data for Q3 2026, the rise in home prices has come to a halt. Duna House's national residential property price index fell slightly compared to the second quarter of the year. In Budapest, prices for both concrete block and brick-and-mortar homes were 2 per cent lower. Meanwhile, sales continued to decelerate, and bargaining strengthened in almost every segment. Sellers are increasingly willing to reduce their asking prices in order to close a deal.

According to Duna House's estimates, 26,754 residential properties changed hands in the third quarter of 2026. This is 6 per cent less than in the second quarter and 22 per cent less than in Q3 2025. Part of the year-on-year decline is the consequence of a base effect. In August and September 2025, the launch of the Otthon Start Program led to exceptionally high transaction volumes. However, compared to the third quarter of 2024, there was also a 13 per cent decline. In the first nine months of the year, 83,307 sales were completed, 15 per cent fewer than a year earlier.

There is an apparent turnaround in the trajectory of prices. The national residential property price index fell from 464 to 462 points in nominal terms. Prices have still risen by 6 per cent over the past year, but in the second quarter this figure stood at 19 per cent. The biggest change occurred in Budapest. The capital's concrete block price index fell from 525 to 514 points, while the brick-and-mortar index dropped from 415 to 406 points. In the previous quarter, the concrete block market in eastern Hungary had been driving up the national average; however, this segment has now stalled. Only brick-and-mortar flats in the east saw a significant price rise of 3 per cent.

Sellers are having to grant more and more discount from their asking prices. The discount on brick-and-mortar homes in the country has roughly doubled over the past year, reaching 6.5 per cent in the east and 7.1 per cent in the west. In Budapest, the discount was around 1 per cent in most segments a year ago; it is now typically 4–5 per cent. Sales are also slower. In September, concrete block units in Buda sold in 101 days on average, compared to 55 days a year ago. For brick-and-mortar homes in Pest, the time it took to sell increased from 80 to 96 days.

Demand has not strengthened. Duna House's demand index stood at 65 points in September, down from 87 points in September last year. First-time buyers continue to form the largest group among buyers, accounting for 39 per cent in both Budapest and in the country. Investors, however, have taken a back seat. In Budapest, the proportion of investment-driven purchases fell from 31 per cent to 18 per cent over the course of a year, and 35 per cent of all sales were driven by cashing in on a previous investment. Borrowers are also more cautious. The average loan amount in Budapest fell from HUF 35.9 million to HUF 34.4 million. Nationwide, the loan-to-value ratio averaged 47 per cent, down from 50 per cent in the second quarter.

Overall, in Q3 2026, sales slowed amidst high price levels and increased bargaining, and the price index also began to fall. At the end of the second quarter, the question was whether the cautious recovery of sellers would spread to the entire market. In Budapest, this process has already begun. If it continues will depend on whether larger discounts bring enough buyers back to the market by the end of the year.

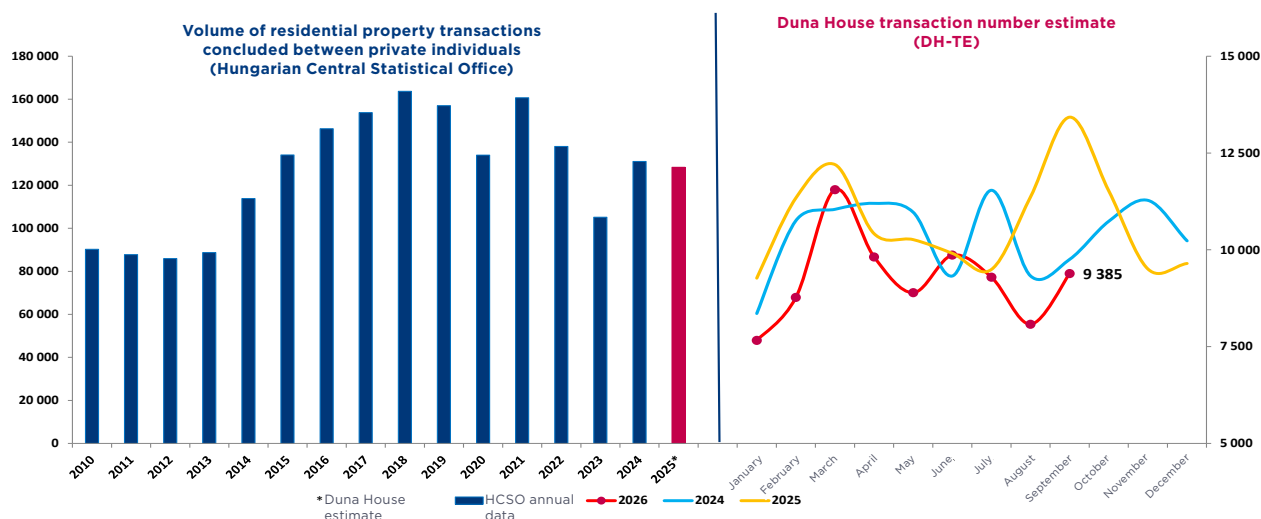
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# TRANSACTION DATA

## DUNA HOUSE TRANSACTION NUMBER ESTIMATE (DH-TE) AND MORTGAGE FORECAST

According to Duna House's monthly estimates of transaction volumes and mortgage forecasts, there were 9385 residential property sales nationwide in September 2026, whilst the expected total value of residential mortgage loans reached HUF 239 billion.



The housing market became more buoyant in September. According to Duna House's estimates, there were 9385 property sales, 16.2 per cent more than in August, but 30.1 per cent fewer than in September last year. The year-on-year decline is partly due to the high base figure. The Otthon Start Program was launched in September last year, and that month saw the highest turnover of the year. In the first nine months of the year, 83,000 properties changed hands. Based on this, annual turnover is likely to be around the mid-point of the previously forecast range of 100,000-120,000.

According to estimates by Credipass, the international financial brand of the Duna House Group, mortgage loan agreements for residential properties worth HUF 239 billion were concluded in Hungary this September. This was 6.3 per cent less than the figure estimated for August, whilst it exceeded the figure recorded by MNB (the Hungarian National Bank) in September last year by 112.2 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   | 8077   | 9385      |         |          |          |

**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.

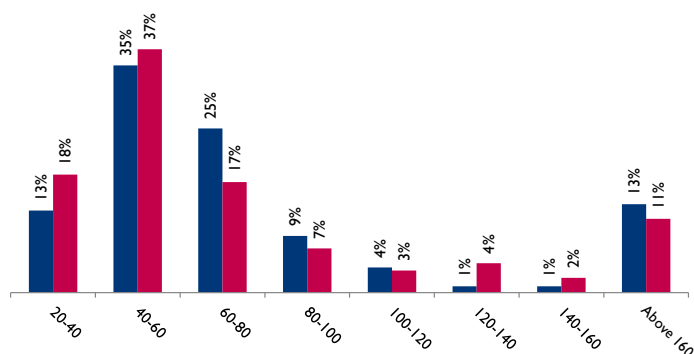
**Please also note** that DH-TE data cannot be used for defining the volume of transactions brokered by Duna House, or for estimating the business profit of Duna House Holding or for the drawing of any related conclusions.

**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

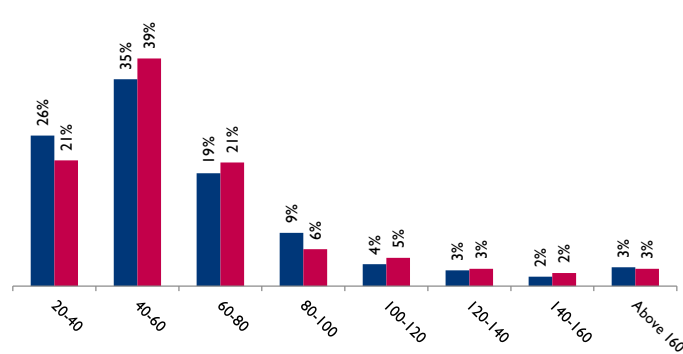
In Buda, sales have shifted towards higher sq. m. prices. The share of flats sold at sq. m. prices exceeding HUF 1.6 million rose from 36 per cent to 52 per cent over the course of a year, and the proportion of those sold for over HUF 2 million per sq. m. rose from 11 per cent to 22 per cent. In the meantime, the share of smaller homes has increased. The share of those measuring 20–40 sq. m. rose from 13 per cent to 18 per cent, while that of the 60–80 sq. m. category fell from 25 per cent to 17 per cent. Purchase prices drifted in two different directions. The share of the HUF 40–70 million bracket rose from 25 per cent to 31 per cent, whilst that of flats priced above HUF 200 million rose from 13 per cent to 18 per cent; the share of the HUF 90–110 million bracket fell from 14 per cent to 8 per cent. In Buda, therefore, flats with a smaller size but a higher sq. m. price changed hands. In Pest, the change was less pronounced. Flats measuring 40–60 sq. m. remained the best-sellers, with their share rising from 35 per cent to 39 per cent. Nearly half (49 per cent) of all sales continued to be concluded at prices between HUF 40 and 70 million. The proportion of sales below HUF 40 million fell from 13 per cent to 10 per cent, while that of the HUF 90–110 million bracket rose from 7 per cent to 10 per cent.

## BUDA

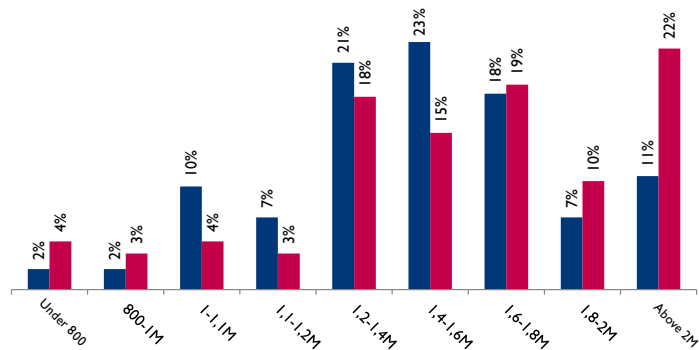


Apartment size (sq. m.)

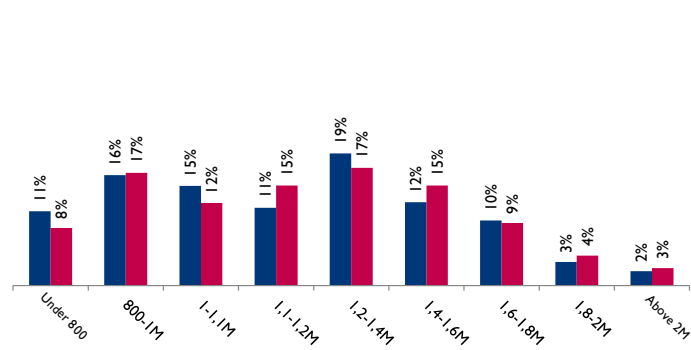
## PEST



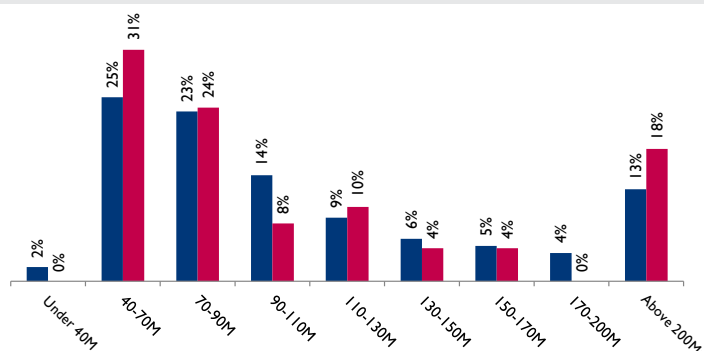
Apartment size (sq. m.)



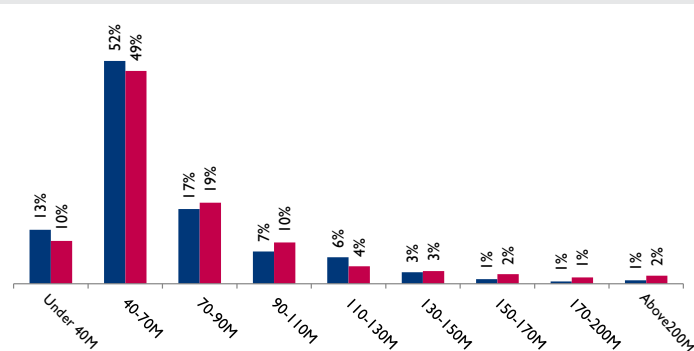
Sq. m. price (in thousand HUF)



Sq. m. price (in thousand HUF)



Apartment price (in million HUF)

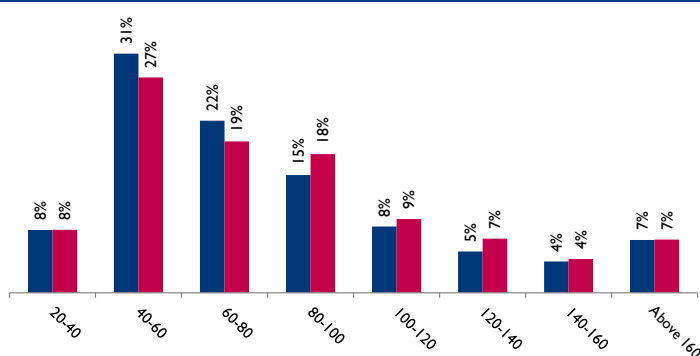


Apartment price (in million HUF)

# TRANSACTION PARAMETERS IN THE COUNTRY

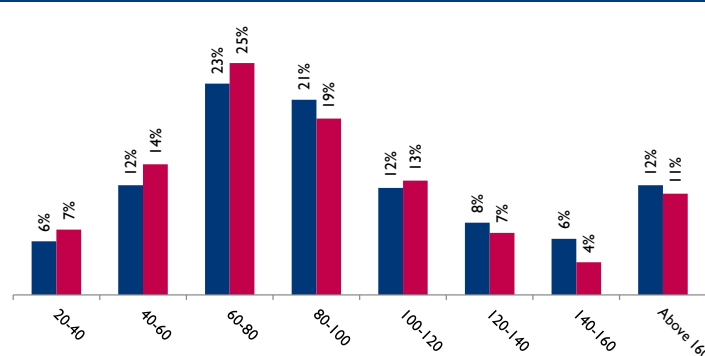
Excluding Central Hungary, homes measuring 40–60 sq. m. remained the best sellers on the national market, although their share fell from 31 per cent to 27 per cent. The share of properties measuring 80–100 sq. m. rose from 15 per cent to 18 per cent. The upward trend in prices per sq. m. has come to a halt. The share of properties sold for over HUF 600,000 per sq. m. remained unchanged over the course of a year, at 47 per cent. In the second quarter, this proportion had risen from 44 per cent to 50 per cent. Purchase prices, however, rose because the properties sold were larger. The proportion of sales priced north of HUF 80 million rose from 7 per cent to 11 per cent, while that in the HUF 30–40 million bracket fell from 19 per cent to 15 per cent. Prices rose sharply in Pest County. The share of sales with a price per sq. m. exceeding HUF 1 million rose from 15 per cent to 24 per cent, while that of properties priced above HUF 800,000 rose from 33 per cent to 50 per cent. The share of sales with a purchase price exceeding HUF 100 million doubled, rising from 11 per cent to 21 per cent.

## COUNTRYWIDE (EXCLUDING CENTRAL HUNGARY)

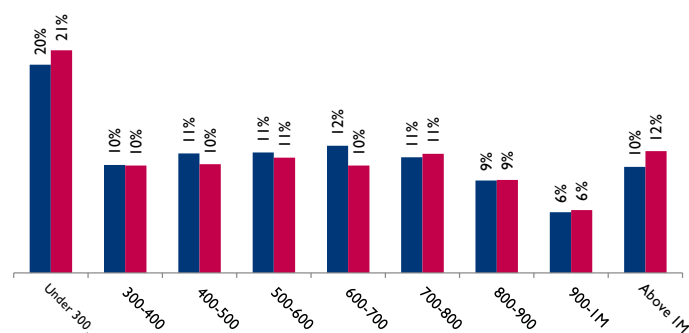


Apartment size (sq. m.)

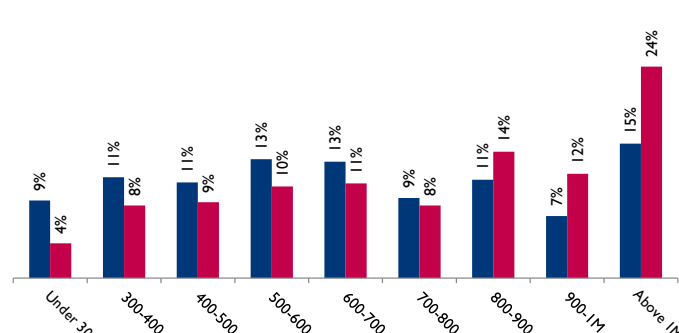
## PEST COUNTY



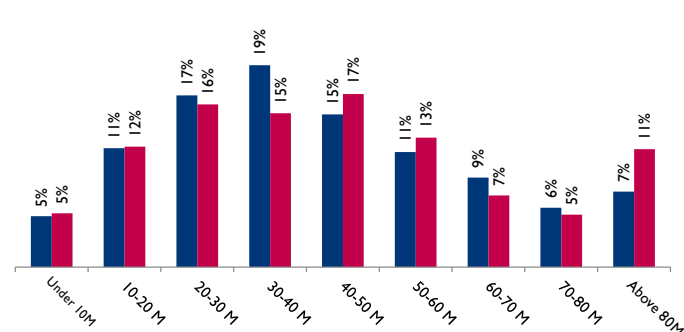
Apartment size (sq. m.)



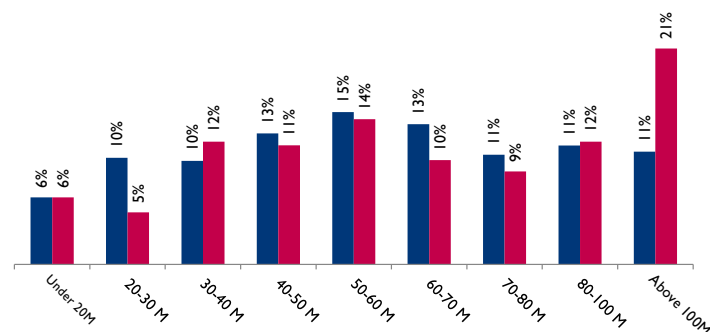
Price per sq. m. (in thousand HUF)



Price per sq. m. (in thousand HUF)



Apartment price (in million HUF)



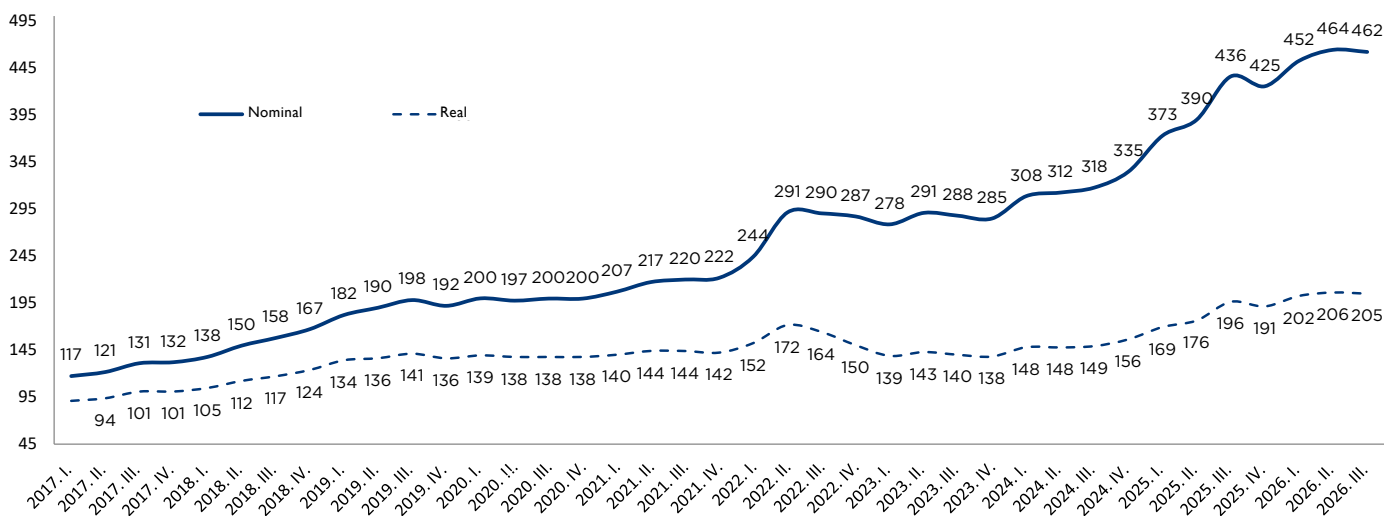
Apartment price (in million HUF)

# PRICES – RESIDENTIAL PROPERTY PRICE INDICES

## DUNA HOUSE NATIONAL RESIDENTIAL PROPERTY PRICE INDEX

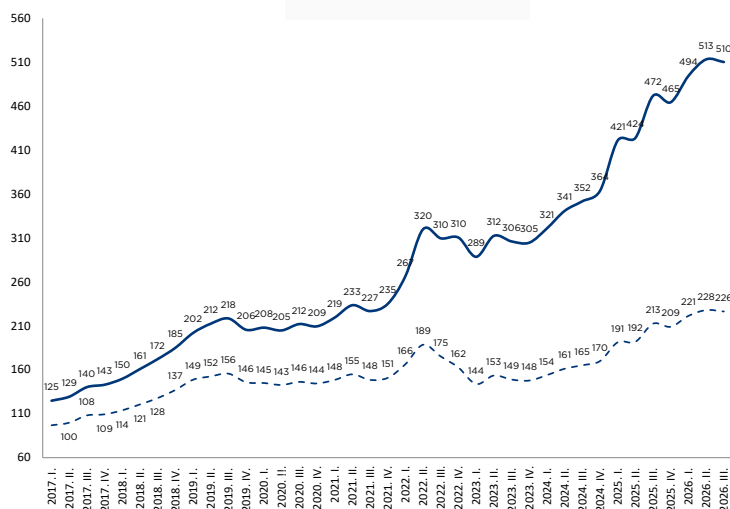
In Q3 2026, the national residential property price index fell from 464 to 462 points in nominal and from 206 to 205 points in real terms. Prices have still risen by 6 per cent over the past year, but this is significantly lower than the 19 per cent recorded in the second quarter of the year. The price indices for both types of property fell. The concrete block index fell from 513 to 510 points, while the brick-and-mortar index went from 412 to 413 points. In the previous quarter, the concrete block market had still been driving the average upwards, but in Q3 this impact was not prevalent. The nationwide price level thus fell slightly over the course of a single quarter.

### NATIONAL RESIDENTIAL PROPERTY PRICE INDEX

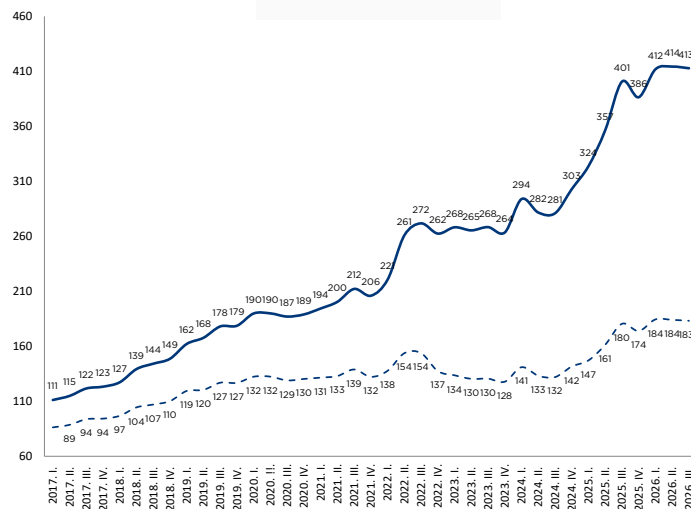


About our property price indices: We calculate the price indices based on the average prices per square metre of completed sales within the Duna House network, separately for prefabricated and brick-built flats in each region. We minimise the impact of changes in the composition of the sample by applying filters based on property type, size and condition. The Budapest brick-and-mortar index is based on the equally weighted average of eight districts. We weight the national indices using the regional proportions of transaction figures published by the Hungarian Central Statistical Office (KSH), while the real index is calculated using KSH's consumer price index. We revised the calculation method of the Budapest brick-and-mortar index in Q3 2026; consequently, this index and the national price indices have been adjusted retrospectively from Q3 2016.

### NATIONAL BLOCK PRICE INDEX



### NATIONAL BRICK-AND-MORTAR PRICE INDEX

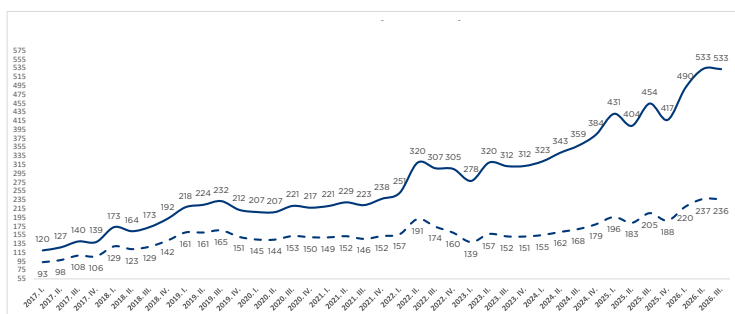


# PRICES – RESIDENTIAL PROPERTY PRICE INDICES

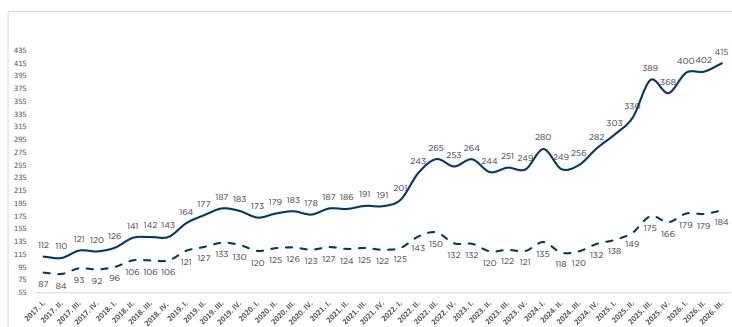
## DUNA HOUSE REGIONAL RESIDENTIAL PROPERTY PRICE INDICES

The driving force behind the second quarter of 2026 – concrete block units in eastern Hungary – has stalled. The price index remained at 533 points, even though it is still 17 per cent higher than a year ago. Only brick-and-mortar homes in the east saw a significant rise in price. Their relevant index rose by 3 per cent, from 400 to 415 points. In Western Hungary, the concrete block index remained unchanged at 479 points, while the brick-and-mortar index fell by 4 per cent from 184 to 180 points. This was the largest quarterly decline amongst the regional indices. As a result, brick-and-mortar homes in the west are now only 1 per cent more expensive than they were a year ago.

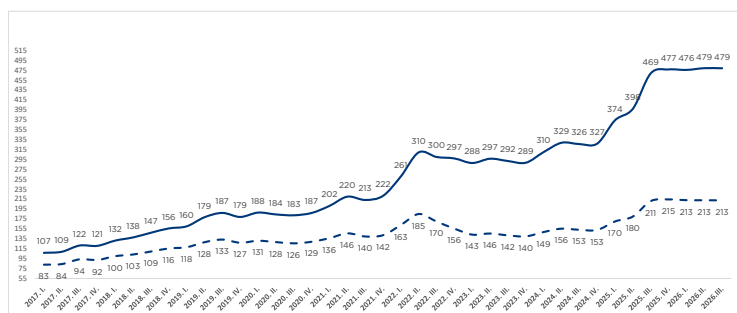
### CONCRETE BLOCK PRICE INDEX, EASTERN HUNGARY



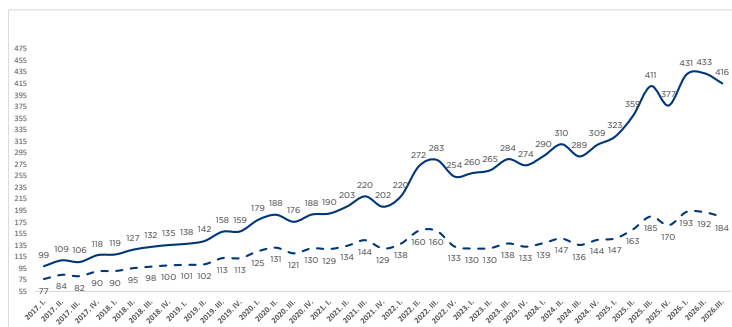
### BRICK-AND-MORTAR PRICE INDEX, EASTERN HUNGARY



### CONCRETE BLOCK PRICE INDEX, WESTERN HUNGARY



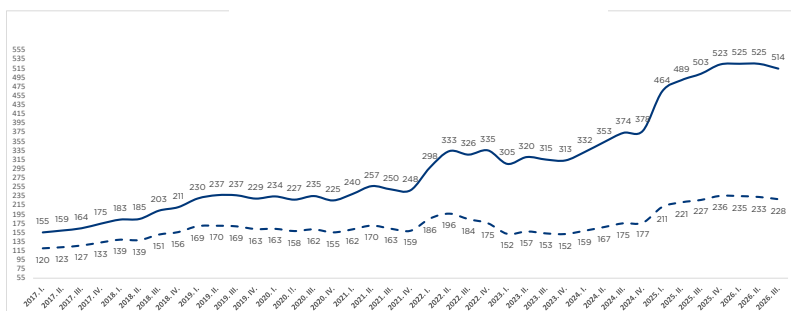
### BRICK-AND-MORTAR PRICE INDEX, WESTERN HUNGARY



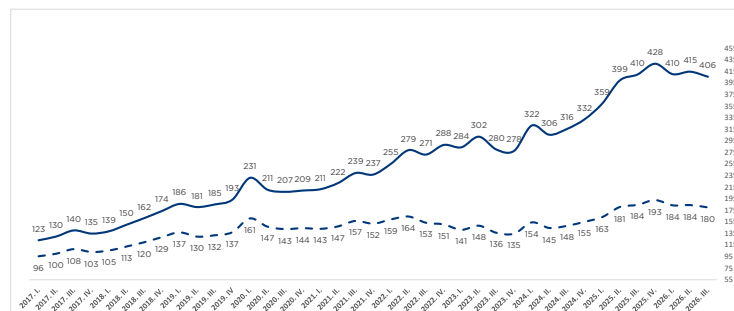
## DUNA HOUSE BUDAPEST RESIDENTIAL PROPERTY PRICE INDICES

Prices fell in both segments in Budapest. The concrete block index fell from 525 to 514 points, whilst its brick-and-mortar counterpart slid from 415 to 406 points, both changes equalling -2 per cent decline. In real terms, the concrete block index fell from 233 to 228 points, while the brick-and-mortar index went from 184 to 180 points. The price index for brick-and-mortar homes in the capital is now 1 per cent below the level recorded in Q3 2025. Concrete block units in Budapest are still 2 per cent more expensive than a year ago. Following the stagnation seen in the second quarter, a decline is now evident in Budapest.

### BUDAPEST CONCRETE BLOCK PRICE INDEX



### BUDAPEST BRICK-AND-MORTAR PRICE INDEX



## SALES DATA, PRICES, BARGAINING

Concrete block prices in the country have risen further. The price per sq. m. for concrete block units in the east rose from HUF 705,000 to HUF 795,000 (+13%) over the course of a year, while in the west it rose from HUF 744,000 to HUF 804,000 (+8%). For pre-owned brick-and-mortar homes the average price per sq. m. rose from HUF 417,000 to HUF 451,000 forints (+8%) in the east and from HUF 513,000 to HUF 548,000 (+7%) in the west. The room for negotiation increased almost everywhere. For brick-and-mortar homes in the country, the discount roughly doubled, rising from 3.5 per cent to 6.5 per cent in the east and from 3.4 per cent to 7.1 per cent in the west. For concrete block units in the west, it jumped from 2.4 per cent to 7.5 per cent.

| BLOCK COUNTRYWIDE |            |              |                         |         |            |              |                         |         |
|-------------------|------------|--------------|-------------------------|---------|------------|--------------|-------------------------|---------|
| EAST              |            |              |                         |         | WEST       |              |                         |         |
|                   | price      | sq. m. price | change in listing price | bargain | price      | sq. m. price | change in listing price | bargain |
| <b>2025. Q3.</b>  | 39 805 000 | 705 000      | 1%                      | 2%      | 39 195 000 | 744 000      | 1%                      | 2%      |
| <b>2026. Q3.</b>  | 44 830 000 | 795 000      | 4%                      | 3%      | 42 204 000 | 804 000      | 3%                      | 8%      |

| BRICK COUNTRYWIDE |            |              |                         |         |            |              |                         |         |
|-------------------|------------|--------------|-------------------------|---------|------------|--------------|-------------------------|---------|
| EAST              |            |              |                         |         | WEST       |              |                         |         |
|                   | price      | sq. m. price | change in listing price | bargain | price      | sq. m. price | change in listing price | bargain |
| <b>2025. Q3.</b>  | 38 193 000 | 417 000      | 5%                      | 4%      | 43 871 000 | 513 000      | 4%                      | 3%      |
| <b>2026. Q3.</b>  | 40 226 000 | 451 000      | 4%                      | 6%      | 49 809 000 | 548 000      | 4%                      | 7%      |

Price hikes were significantly less pronounced in Budapest. The price per sq. m. for concrete block units in Buda rose from HUF 1.24 million to HUF 1.26 million, while in Pest it went from HUF 1.09 million to HUF 1.12 million – an increase by 2 per cent in both cases. For pre-owned brick-and-mortar flats, the average price rose from HUF 1.57 million to HUF 1.59 million (+1%) in Buda, and from HUF 1.00 million to HUF 1.03 million (+2%) in Pest. In the city centre, the average price fell from HUF 1.42 million to HUF 1.40 million, translating into a decrease of 2 per cent. Price reductions increased most significantly in the capital. A year ago, discounts for concrete block homes in Buda and Pest, as well as for brick-and-mortar homes in Buda, were still around 1 per cent; they now range between 3.5 per cent and 4.6 per cent. For brick-and-mortar homes in Pest, the discount rose from 2.0% to 4.7 per cent, while in the city centre it rose from 3.3% to 5.2 per cent. Prices are therefore still rising, but sellers need to make increasingly larger concessions to close a deal.

| BLOCK BUDAPEST   |            |              |                         |         |            |              |                         |         |
|------------------|------------|--------------|-------------------------|---------|------------|--------------|-------------------------|---------|
| BUDA             |            |              |                         |         | PEST       |              |                         |         |
|                  | price      | sq. m. price | change in listing price | bargain | price      | sq. m. price | change in listing price | bargain |
| <b>2025. Q3.</b> | 66 050 000 | 1 242 000    | 6%                      | 1%      | 58 493 000 | 1 089 000    | 0%                      | 1%      |
| <b>2026. Q3.</b> | 65 441 000 | 1 264 000    | 2%                      | 4%      | 60 291 000 | 1 116 000    | 5%                      | 4%      |

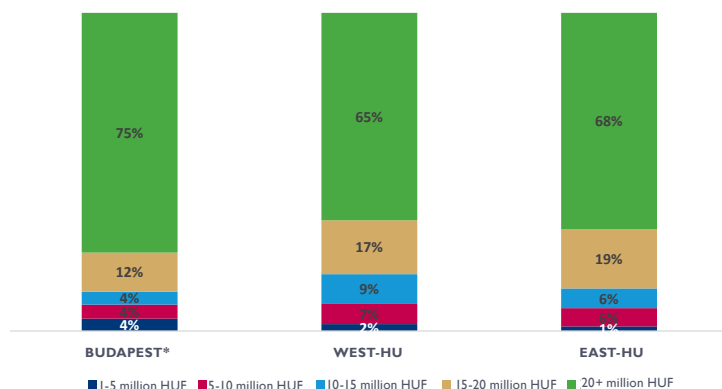
| BRICK BUDAPEST   |             |              |                         |         |            |              |                         |         |            |              |                         |         |
|------------------|-------------|--------------|-------------------------|---------|------------|--------------|-------------------------|---------|------------|--------------|-------------------------|---------|
| 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 |
| <b>2025. Q3.</b> | 137 626 000 | 1 569 000    | 3%                      | 1%      | 66 979 000 | 1 003 000    | 3%                      | 2%      | 78 497 000 | 1 423 000    | 2%                      | 3%      |
| <b>2026. Q3.</b> | 133 801 000 | 1 587 000    | 4%                      | 5%      | 72 227 000 | 1 026 000    | 5%                      | 5%      | 94 673 000 | 1 401 000    | 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.

# MORTGAGE DATA – Q3 2026

## MORTGAGES BY TRANSACTION VALUE



In Q3 2026, 75 per cent of borrowers in Budapest took out loans north of HUF 20 million. This is a lower figure than in Q2 (81 per cent). In the east, the proportion was 68 per cent, and in the west 65 per cent, roughly the same as a quarter earlier.

## AVERAGE LOAN VOLUME

| AVERAGE LOAN VOLUME |            |            |            |            |
|---------------------|------------|------------|------------|------------|
|                     | Q4 2025    | Q1 2026    | Q2 2026    | Q3 2026    |
| BUDAPEST*           | 34 990 285 | 36 473 576 | 35 866 169 | 34 404 351 |
| WEST-HU             | 27 192 996 | 27 458 683 | 27 510 037 | 27 341 445 |
| EAST-HU             | 28 480 597 | 28 619 470 | 28 694 271 | 29 888 285 |

The average loan amount in Budapest fell further, from HUF 35.9 million to HUF 34.4 million. In the west, it went from HUF 27.5 million to HUF 27.3 million, whilst in the east it rose from HUF 28.7 million to HUF 29.9 million. As a result, the average loan amount in the capital has fallen by HUF 2 million over two quarters.

## MORTGAGES BY DURATION



25-year loans remained the most popular. In Budapest, 74 per cent of transactions were for this term, compared with 69 per cent in the west and 76 per cent in the east. The biggest shift occurred in the east, where the proportion of 25-year loans rose from 66 per cent to 76 per cent in the space of a single quarter.

|          | BUDAPEST* |         |         |         | WESTERN HUNGARY |         |         |         | EASTERN HUNGARY |         |         |         |
|----------|-----------|---------|---------|---------|-----------------|---------|---------|---------|-----------------|---------|---------|---------|
|          | Q4 2025   | Q1 2026 | Q2 2026 | Q3 2026 | Q4 2025         | Q1 2026 | Q2 2026 | Q3 2026 | Q4 2025         | Q1 2026 | Q2 2026 | Q3 2026 |
| 10 YEARS | 4%        | 3%      | 3%      | 2%      | 4%              | 5%      | 6%      | 6%      | 5%              | 3%      | 6%      | 3%      |
| 15 YEARS | 5%        | 3%      | 5%      | 2%      | 4%              | 3%      | 5%      | 2%      | 4%              | 7%      | 7%      | 3%      |
| 20 YEARS | 10%       | 12%     | 12%     | 13%     | 18%             | 13%     | 16%     | 14%     | 16%             | 18%     | 12%     | 13%     |
| 25 YEARS | 73%       | 74%     | 71%     | 74%     | 67%             | 54%     | 67%     | 69%     | 67%             | 67%     | 66%     | 76%     |
| 30 YEARS | 1%        | 2%      | 2%      | 3%      | 1%              | 16%     | 0%      | 0%      | 0%              | 0%      | 1%      | 1%      |
| OTHER    | 7%        | 6%      | 7%      | 6%      | 4%              | 8%      | 5%      | 9%      | 7%              | 5%      | 9%      | 4%      |

**Mortgage data methodology:** When analysing data we used applications mediated by Credipass and submitted during the given quarter, based on loan volume, interest period and the term of the loan, in regional breakdown. The analysis of the family home allowance scheme (CSOK) only considered the ratio of CSOK applications submitted in combination with a loan application, so the figure does not indicate the overall penetration ratio of the allowance on the entire property market.

\*Budapest and the suburbs combined.

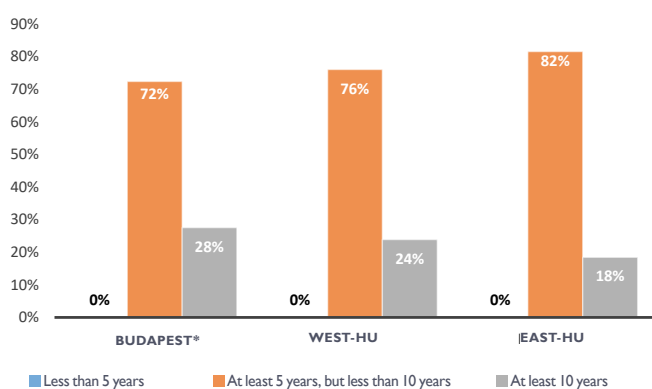
# MORTGAGE DATA – Q3 2026

## AVERAGE LOAN VOLUME

| AVERAGE LOAN VOLUME |         |         |         |         |
|---------------------|---------|---------|---------|---------|
|                     | Q4 2025 | Q1 2026 | Q2 2026 | Q3 2026 |
| <b>BUDAPEST*</b>    | 48%     | 48%     | 47%     | 45%     |
| <b>WEST-HU</b>      | 59%     | 52%     | 56%     | 49%     |
| <b>EAST-HU</b>      | 55%     | 55%     | 51%     | 53%     |
| <b>TOTAL</b>        | 52%     | 50%     | 50%     | 47%     |

The national average of the loan-to-value (LTV) ratio fell from 50 per cent to 47 per cent. This means that buyers were now financing a smaller proportion of the property price through a mortgage. The biggest change was in the west, where the ratio fell from 56 per cent to 49 per cent. In Budapest, it fell from 47 per cent to 45 per cent, and in the east it rose from 51 per cent to 53 per cent.

## MORTGAGES BY INTEREST PERIOD



When it comes to the interest rate period, fixed-rate loans with a term of at least 5 years but less than 10 years remain the most popular. In Budapest, their share rose from 62 per cent to 72 per cent; in the west it stood at 76 per cent, and in the east at 82 per cent.

|                                                | BUDAPEST* |         |         |         | WESTERN HUNGARY |         |         |         | EASTERN HUNGARY |         |         |         |
|------------------------------------------------|-----------|---------|---------|---------|-----------------|---------|---------|---------|-----------------|---------|---------|---------|
|                                                | Q4 2025   | Q1 2026 | Q2 2026 | Q3 2026 | Q4 2025         | Q1 2026 | Q2 2026 | Q3 2026 | Q4 2025         | Q1 2026 | Q2 2026 | Q3 2026 |
| <b>LESS THAN 5 YEARS</b>                       | 0%        | 0%      | 0%      | 0%      | 4%              | 2%      | 0%      | 0%      | 0,5%            | 1%      | 0%      | 0%      |
| <b>5 YEARS OR MORE, BUT LESS THAN 10 YEARS</b> | 71%       | 71%     | 62%     | 72%     | 81%             | 84%     | 76%     | 76%     | 91%             | 87%     | 77%     | 82%     |
| <b>AT LEAST 10 YEARS</b>                       | 29%       | 29%     | 38%     | 28%     | 15%             | 13%     | 24%     | 24%     | 9%              | 11%     | 23%     | 18%     |

## SUBMITTED CSOK PLUS APPLICATIONS IN THE RATIO OF ALL QUARTERLY LOAN TRANSACTIONS

| SUBMITTED CSOK PLUS APPLICATIONS IN THE RATIO OF ALL QUARTERLY LOAN TRANSACTIONS |       |
|----------------------------------------------------------------------------------|-------|
| <b>BUDAPEST*</b>                                                                 | 13,0% |
| <b>WEST-HU</b>                                                                   | 14,3% |
| <b>EAST-HU</b>                                                                   | 15,8% |
| <b>TOTAL</b>                                                                     | 13,8% |

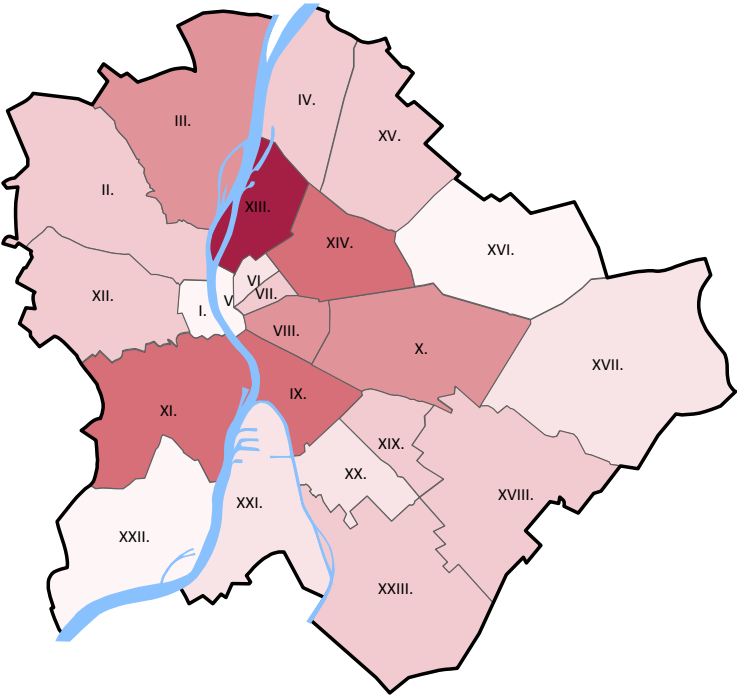
Demand for the CSOK Plus loan has risen once again. The prevalence of this subsidised scheme among loan applications submitted rose from 12.1 per cent to 13.8 per cent nationwide. In Budapest, it rose from 11.7 per cent to 13.0 per cent; in the west, from 11.8 per cent to 14.3 per cent; and in the east, from 14.2 per cent to 15.8 per cent.

**Mortgage data methodology:** When analysing data we used applications mediated by Credipass and submitted during the given quarter, based on loan volume, interest period and the term of the loan, in regional breakdown. The analysis of the family home allowance scheme (CSOK) only considered the ratio of CSOK applications submitted in combination with a loan application, so the figure does not indicate the overall penetration ratio of the allowance on the entire property market.

\* Budapest and the suburbs combined.

# NEWLY BUILT DATA

## NUMBER OF NEWLY BUILT APARTMENTS IN DEVELOPMENT PROJECTS CURRENTLY ON SALE

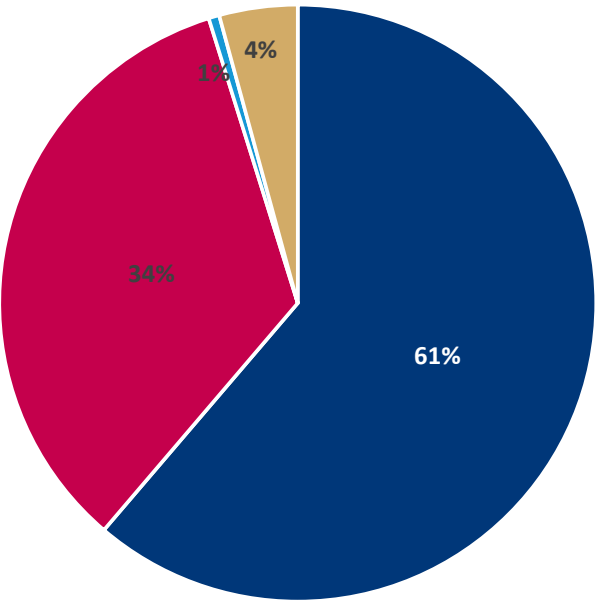


| QUANTITY   | DISTRICTS                                       |
|------------|-------------------------------------------------|
| ABOVE 7000 | XIII.                                           |
| 2000-6999  | IX., XI., XIV.                                  |
| 900-1999   | III., VIII., X.                                 |
| 200-899    | II., IV., VII., XII., XV., XVIII., XIX., XXIII. |
| 100-199    | VI., XVII., XX., XXI.                           |
| UNDER 100  | I., V., XVI., XXII.                             |



Among the projects currently on sale in Budapest, District 13 continued to have the highest number of new flats, with more than 10,000 units. District 13 was followed by District 11 (Újbuda, around 5300 units) and the District 9 (around 2800 units). Sixty-one per cent of the flats on the market have already been sold, 35 per cent are still available and the proportion of flats reserved is around 1 per cent. These figures have changed very little compared with the second quarter. In Q3, 1349 new flats were sold in the projects surveyed, with the highest numbers in District 13 (358 units) and District 11 (231 units).

## DISTRIBUTION OF NEWLY BUILT APARTMENTS BASED ON SALES PHASE IN Q3 2026



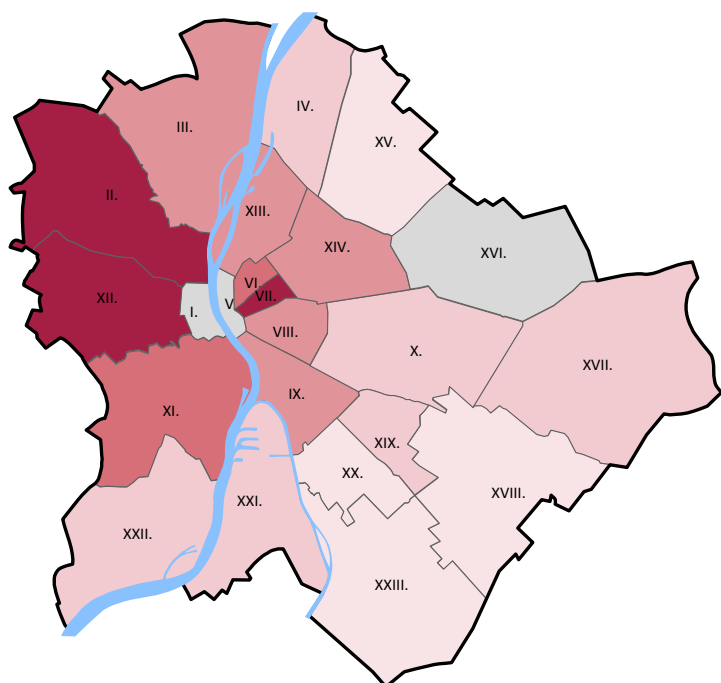
Figures are based on the number of apartments offered in projects listed in the ELTINGA Budapest Residential Property Report database.

- AVAILABLE:**  
Units free for purchase at the time of data collection.
- RESERVED:**  
Negotiations pending or a deposit has been paid.
- SOLD:**  
Apartments marked as “sold” or removed from the database of available units.
- PLANNED:**  
Apartments where the sales process has not yet started or has been suspended.

## NEWLY BUILT DATA

### AVERAGE SQ. M. PRICE OF NEW-BUILD HOMES

The average price per sq. m. of newly built housing is highly dependent on the location of the project.



| AVERAGE M2 PRICE                   | DISTRICTS                         |
|------------------------------------|-----------------------------------|
| ABOVE 2,3 MILLION                  | II., VII., XII.                   |
| BETWEEN 1,8-2,3 MILLION            | VI., XI.                          |
| BETWEEN 1,5-1,8 MILLION            | III., VIII., IX., XIII., XIV.     |
| BETWEEN 1,3 THOUSAND - 1,5 MILLION | IV., X., XVII., XIX., XXI., XXII. |
| UNDER 1,3 MILLION                  | XV., XVIII., XX., XXIII.          |
| NO DATA                            | I., V., XVI.                      |



The average price per sq. m. for newly built homes in the capital was HUF 1.71 million, compared with HUF 1.69 million in the second quarter. The most expensive districts for buying a new home were Districts 12 (HUF 3.3 million per sq. m.), District 2 (HUF 2.9 million per sq. m.) and District 7 (HUF 2.5 million per sq. m.). The cheapest districts were Districts 20, 15 and 18, with prices per sq. m. below HUF 1.3 million in all three. The average price of new flats sold was HUF 108 million.

Average sq. m. prices are based on projects listed in the ELTINGA Budapest Residential Property Report database.

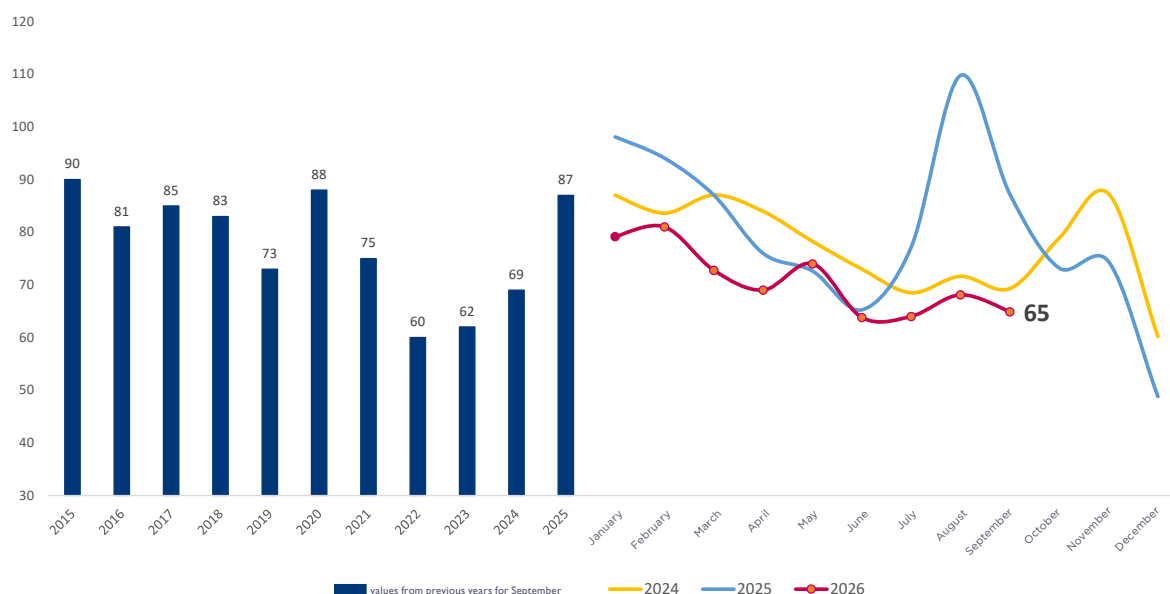
Prices are based on properties listed as sold in the Q3 database.

Floor space includes half the surface area of balconies and walk-out terraces with a maximum area of 20 sq. m. and one third of the area above 20 sq. m.



## BUYERS – DEMAND INDEX

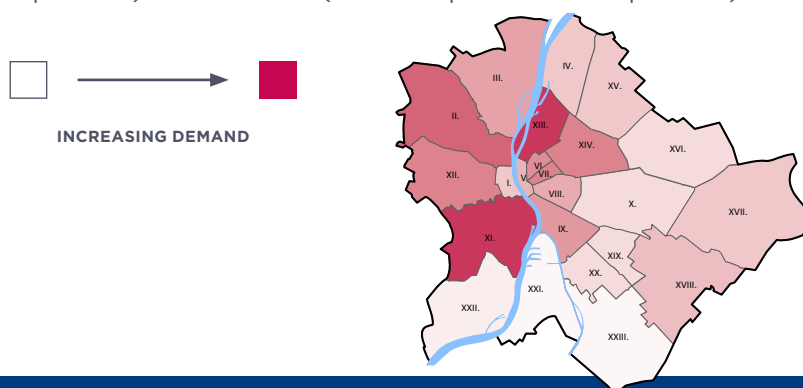
The Duna House demand index stood at 65 points in September 2026. This is slightly below the 68 points recorded in August, and significantly lower than the 87 points recorded in September last year. The figure for September 2025 was an outlier due to the launch of the Otthon Start Program. The current figure of 65 points is above the lows recorded in 2022 and 2023 (60 and 62 points respectively), but falls short of the 69 points recorded in 2024 and the September figures between 2015 and 2021 (73-90 points). In Q3, the index averaged 66 points, compared with 91 points a year earlier.



**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

Demand for individual districts has fallen almost everywhere over the past year. Of the 23 districts of the capital, demand rose in only two: District 2 (from 16.1 per cent to 16.9 per cent) and District 17 (from 6.0 per cent to 7.6 per cent). District 2 has thus moved up from seventh to third place. District 13 remained the most sought-after (20.5 per cent), although a year ago this figure stood at 25.3 per cent. It is followed by District 11 (19.8 per cent), where demand has barely changed. The sharpest decline was seen in District 14, from 20.3 per cent to 14.0 per cent, causing it to slip from second to fourth place. Demand also fell significantly in District 8 (from 15.9 per cent to 10.0 per cent) and District 4 (from 12.6 per cent to 7.7 per cent).



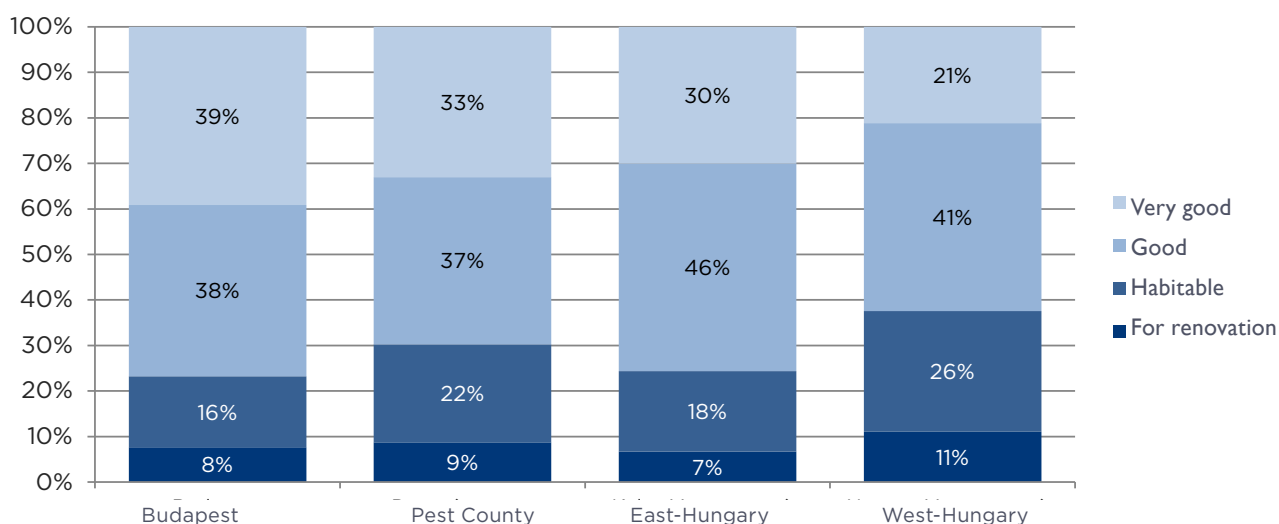
| DISTRICT    | SEPTEMBER 2025 | SEPTEMBER 2026 |
|-------------|----------------|----------------|
| District 1  | 8,8%           | 8,1%           |
| District 2  | 16,1%          | 16,9%          |
| District 3  | 13,8%          | 11,2%          |
| District 4  | 12,6%          | 7,7%           |
| District 5  | 11,9%          | 9,9%           |
| District 6  | 17,7%          | 13,3%          |
| District 7  | 17,5%          | 13,9%          |
| District 8  | 15,9%          | 10,0%          |
| District 9  | 16,3%          | 12,0%          |
| District 10 | 8,4%           | 6,2%           |
| District 11 | 20,0%          | 19,8%          |
| District 12 | 14,0%          | 13,6%          |
| District 13 | 25,3%          | 20,5%          |
| District 14 | 20,3%          | 14,0%          |
| District 15 | 9,3%           | 7,3%           |
| District 16 | 7,4%           | 5,6%           |
| District 17 | 6,0%           | 7,6%           |
| District 18 | 10,4%          | 8,9%           |
| District 19 | 9,5%           | 6,0%           |
| District 20 | 6,9%           | 6,3%           |
| District 21 | 3,8%           | 3,5%           |
| District 22 | 4,5%           | 4,4%           |
| District 23 | 3,4%           | 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

There continues to be a significant difference between Budapest and the rest of the country in terms of the condition of homes purchased. In Budapest, 39 per cent of sales involved flats in a 'very good', and 38 per cent in a 'good' condition, while 8 per cent of homes sold required renovation. In the capital, therefore, more than three-quarters of sales were for properties in a good condition or better. In Eastern Hungary, the good category was the largest (46 per cent), and the proportion of homes in a very good condition was 30 per cent. The composition is poorest in Western Hungary. Here, the proportion of 'habitable' homes was 26 per cent, those in need of renovation accounted for 11 per cent, and those in a very good condition made up only 21 per cent. In Pest County, properties in a good (37 per cent) and a very good (33 per cent) condition were in the majority.



## TURNOVER SPEED (TIME NEEDED TO SELL)

In September, the time it took to sell a property was longer than a year ago in almost every market. The biggest change was seen for concrete block units in Buda. Here, the average time rose from 55 days to 101 days – in other words, it almost doubled. The same figure in Pest rose from 60 to 81 and in the eastern part of the country from 69 to 96 days. Only in the west did the time it took to sell concrete block units decrease, from 80 to 76 days. For pre-owned brick-and-mortar homes, the time needed to sell increased from 80 to 96 days in Pest, from 87 to 99 days in Buda, from 82 to 90 days in the city centre, and from 92 to 102 days in the east. In the west, it fell from 109 to 106 days, but this is where the sales process takes the longest. A year ago, concrete block homes in Buda were the fastest-selling segment in the country; today, they are among the slowest.

| BLOCK                   |      |      |      |      |
|-------------------------|------|------|------|------|
| TIME NEEDED OF SALE/DAY |      |      |      |      |
|                         | EAST | WEST | BUDA | PEST |
| 2025 September          | 69   | 80   | 55   | 60   |
| 2026 September          | 96   | 76   | 101  | 81   |

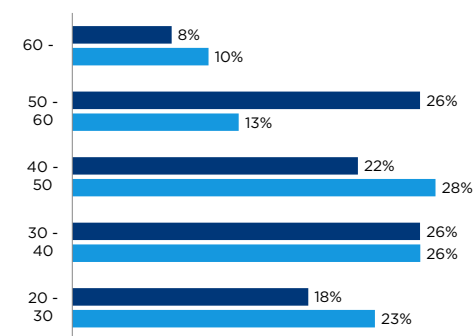
  

| BRICK                   |      |      |      |      |            |
|-------------------------|------|------|------|------|------------|
| TIME NEEDED OF SALE/DAY |      |      |      |      |            |
|                         | EAST | WEST | BUDA | PEST | INNER CITY |
| 2025 September          | 92   | 109  | 87   | 80   | 82         |
| 2026 September          | 102  | 106  | 99   | 96   | 90         |

## BUYER PROFILE IN BUDAPEST

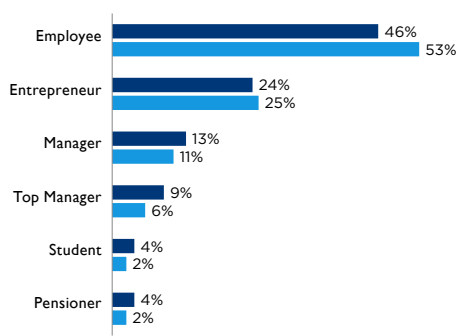
Among buyers in Budapest, those purchasing their first home remained the largest group in September, with their presence unchanged over the past year (39 per cent). The share of purchases made for investment purposes, however, fell from 31 per cent to 18 per cent. They were replaced by people moving into another home. The proportion of those moving into a larger home rose from 14 per cent to 17 per cent, and those moving to a smaller home went from a share of 5 per cent to 15 per cent. The proportion of 50–60-year-olds jumped from 13 per cent to 26 per cent, while that of 20–30-year-olds fell from 23 per cent to 18 per cent. Taken together, these two changes suggest that more older buyers have downsized. Buyers in Budapest paid an average of HUF 89 million for a 70 sq. m. home.

### BUYERS' AGE IN BUDAPEST



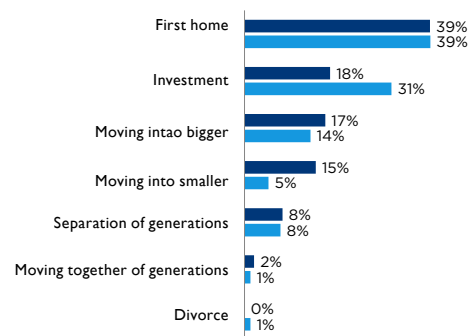
| AGE     | AVERAGE PRICE | sq. m. |
|---------|---------------|--------|
| 20 - 30 | 66 508 000    | 59     |
| 30 - 40 | 77 700 000    | 71     |
| 40 - 50 | 103 919 000   | 81     |
| 50 - 60 | 104 358 000   | 63     |
| 60 -    | 86 925 000    | 81     |

### BUYERS' STATUS IN BUDAPEST



| STATUS       | AVERAGE PRICE | sq. m. |
|--------------|---------------|--------|
| Employee     | 66 668 000    | 60     |
| Top Manager  | 54 758 000    | 47     |
| Manager      | 65 230 000    | 52     |
| Pensioner    | 92 100 000    | 125    |
| Student      | 44 800 000    | 33     |
| Entrepreneur | 158 164 000   | 104    |

### MOTIVATON IN BUDAPEST

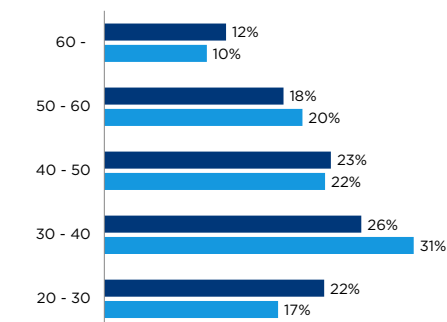


| SITUATION                      | AVERAGE PRICE | sq. m. |
|--------------------------------|---------------|--------|
| Investment                     | 64 703 000    | 48     |
| First Home                     | 63 622 000    | 54     |
| Separation of generations      | 56 150 000    | 45     |
| Moving together of generations | 94 200 000    | 180    |
| Moving into smaller            | 85 734 000    | 60     |
| Moving into bigger             | 170 059 000   | 128    |
| Divorce                        | -             | -      |

## BUYER PROFILE IN THE COUNTRY

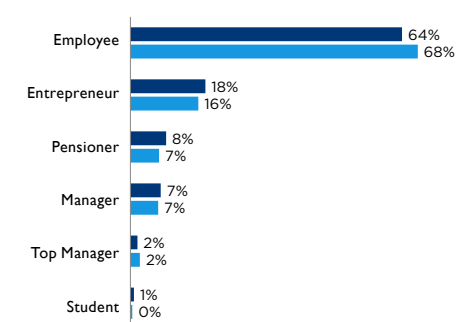
The buyer base is more stable in the country. The share of first-time buyers was 39 per cent, compared with 40 per cent a year ago. Those moving into a larger home accounted for 23 per cent, while investors accounted for 19 per cent; both figures remained virtually unchanged. The proportion of 20–30-year-olds rose from 17 per cent to 22 per cent, and that of 30–40-year-olds fell from 31 per cent to 26 per cent. Buyers in the country paid an average of HUF 55 million for an 86 sq. m. property.

### BUYERS' AGE IN THE COUNTRY



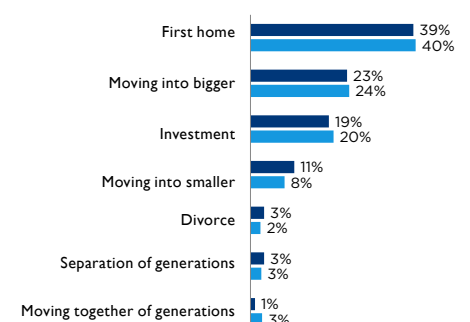
| AGE     | AVERAGE PRICE | sq. m. |
|---------|---------------|--------|
| 20 - 30 | 53 677 000    | 85     |
| 30 - 40 | 62 308 000    | 95     |
| 40 - 50 | 53 816 000    | 88     |
| 50 - 60 | 46 415 000    | 69     |
| 60 -    | 55 667 000    | 90     |

### BUYERS' STATUS IN THE COUNTRY



| STATUS       | AVERAGE PRICE | sq. m. |
|--------------|---------------|--------|
| Employee     | 47 108 000    | 80     |
| Top Manager  | 132 600 000   | 130    |
| Manager      | 68 495 000    | 84     |
| Pensioner    | 45 700 000    | 77     |
| Student      | 41 625 000    | 73     |
| Entrepreneur | 72 429 000    | 108    |

### MOTIVATON IN THE COUNTRY



| SITUATION                      | AVERAGE PRICE | sq. m. |
|--------------------------------|---------------|--------|
| Investment                     | 38 595 000    | 63     |
| First Home                     | 51 767 000    | 84     |
| Separation of generations      | 46 789 000    | 75     |
| Moving together of generations | 82 634 000    | 210    |
| Moving into smaller            | 43 176 000    | 62     |
| Moving into bigger             | 84 126 000    | 122    |
| Divorce                        | 30 700 000    | 63     |

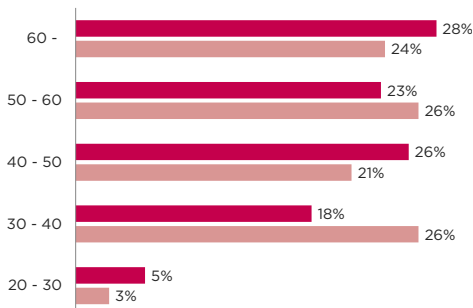
■ September 2025 ■ September 2026

Data presented above relating to age, status and reason of purchase have been acquired through the voluntary declaration of our clients. They qualify as a sample and are regarded as estimated values and mainly serve as a basis of detecting certain trends. Investment as a motivation includes all business and private deals listed under those categories based on the client's declaration. In certain cases a property purchased for a child who will use it sometime in the future will fall into the investment category, based on the present transaction questionnaire, although it will eventually serve the separation of generations. When doing the calculations, we also have to keep in mind that the Duna House network is primarily present in Budapest and major cities, therefore investment as a motivation may be over-represented compared to the rest of the country.

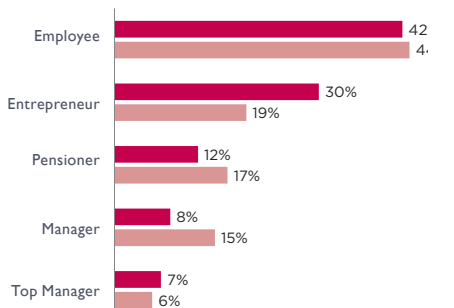
## SELLER PROFILE IN BUDAPEST

In Budapest, 35 per cent of transactions were driven by the sale of a previous investment, compared to 37 per cent a year ago. This remained the most common reason for selling. The proportion of sellers moving into a larger home stood at 27 per cent, while the share of those moving into a smaller one rose from 12 per cent to 17 per cent. The share of older people amongst sellers increased. The proportion of those aged over 60 rose from 24 per cent to 28 per cent, and that of those aged 30-40 fell from 26 per cent to 18 per cent. The proportion of self-employed sellers rose from 19 per cent to 30 per cent.

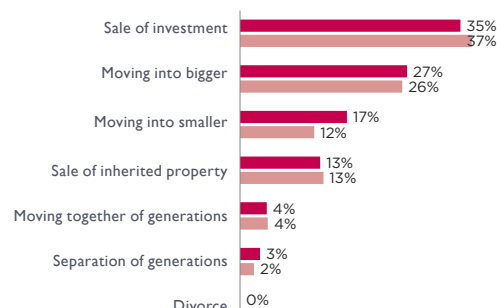
### SELLERS' AGE BUDAPEST



### SELLERS' STATUS BUDAPEST



### MOTIVATON BUDAPEST



| AGE     | AVERAGE PRICE | sq. m. |
|---------|---------------|--------|
| 20 - 30 | 50 080 000    | 47     |
| 30 - 40 | 71 362 000    | 56     |
| 40 - 50 | 105 884 000   | 70     |
| 50 - 60 | 99 963 000    | 74     |
| 60 -    | 98 429 000    | 92     |

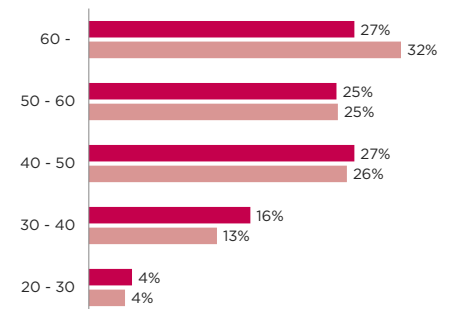
| STATUS       | AVERAGE PRICE | sq. m. |
|--------------|---------------|--------|
| Employee     | 75 869 000    | 74     |
| Top Manager  | 129 310 000   | 72     |
| Manager      | 73 184 000    | 55     |
| Pensioner    | 85 412 000    | 93     |
| Entrepreneur | 120 359 000   | 76     |

| SITUATION                      | AVERAGE PRICE | sq. m. |
|--------------------------------|---------------|--------|
| Sale of investment             | 90 451 000    | 58     |
| Separation of generations      | 65 034 000    | 60     |
| Moving together of generations | 56 248 000    | 49     |
| Moving into smaller            | 106 325 000   | 104    |
| Moving into bigger             | 90 480 000    | 69     |
| Sale of inherited property     | 60 625 000    | 51     |
| Divorce                        | -             | -      |

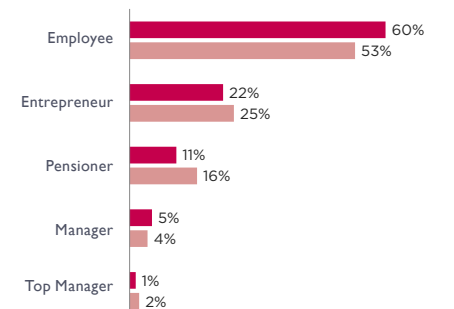
## SELLER PROFILE IN THE COUNTRY

In the country, the proportion of people who sold their previous property investment rose from 26 per cent to 34 per cent over the course of a year. This became the most common reason for selling. The sale of inherited properties fell from 28 per cent to 25 per cent, whilst the share of people moving into a larger home remained at 17 per cent. Among sellers, there are fewer people aged over 60 (down from 32% to 27%) and more in their 30s (up from 13% to 16%). Taken together, the data on buyers and sellers show that investors in both Budapest and in the country are more likely to sell than to buy. In Budapest, 18 per cent of buyers and 35 per cent of sellers are investors. In the country, the figures are 19 per cent and 34 per cent respectively.

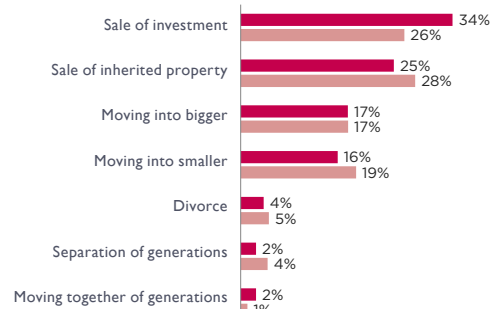
### SELLERS' AGE IN THE COUNTRY



### SELLERS' STATUS IN THE COUNTRY



### MOTIVATON IN THE COUNTRY



| AGE     | AVERAGE PRICE | sq. m. |
|---------|---------------|--------|
| 20 - 30 | 50 858 000    | 91     |
| 30 - 40 | 53 046 000    | 87     |
| 40 - 50 | 56 109 000    | 77     |
| 50 - 60 | 49 569 000    | 92     |
| 60 -    | 50 137 000    | 87     |

| STATUS       | AVERAGE PRICE | sq. m. |
|--------------|---------------|--------|
| Employee     | 49 239 000    | 88     |
| Top Manager  | 85 167 000    | 146    |
| Manager      | 60 855 000    | 71     |
| Pensioner    | 53 579 000    | 80     |
| Entrepreneur | 80 918 000    | 103    |

| SITUATION                      | AVERAGE PRICE | sq. m. |
|--------------------------------|---------------|--------|
| Sale of investment             | 59 158 000    | 75     |
| Separation of generations      | 91 584 000    | 146    |
| Moving together of generations | 23 917 000    | 66     |
| Moving into smaller            | 62 365 000    | 117    |
| Moving into bigger             | 66 205 000    | 82     |
| Sale of inherited property     | 40 779 000    | 82     |
| Divorce                        | 78 323 000    | 114    |

■ September 2025 ■ September 2026

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. Investment as a motivation includes all business and private deals listed under those categories based on the client's declaration. In certain cases a property purchased for a child who will use it sometime in the future will fall into the investment category, based on the present transaction questionnaire, although it will eventually serve the separation of generations. When doing the calculations, we also have to keep in mind that the Duna House network is primarily present in Budapest and major cities, therefore investment as a motivation may be over-represented compared to the rest of the country.



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