REAL ESTATE

Developer and City-wise Sales Performance Analysis

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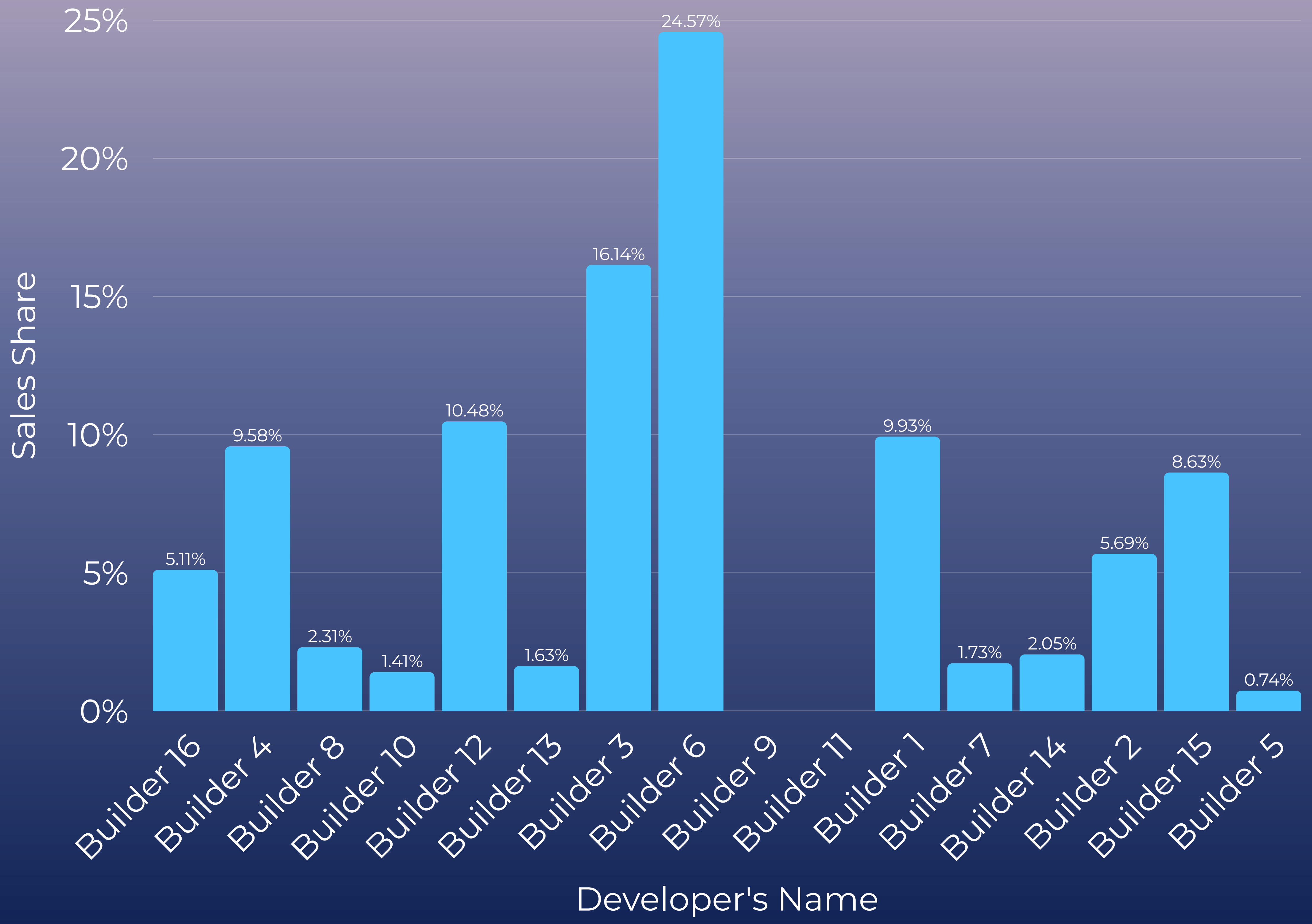
Executive summary

- **Latest date:** 05-Oct-2025 | **Cut-off:** 05-Oct-2024
- **Total annual sales value (last 12 months, 1–3 BHK): ₹ 2,872.83 Cr**
- **Total Jun’25 quarter sales value (all cities): ₹ 717.8 Cr**

High-level concentration:

- **Top 5 developers** contribute **~70.7%** of annual sales value (Builder 6, 3, 12, 1, 4).
- **Top 3 cities** (NCR, Goa, Hyderabad) contribute **~84.5%** of Jun’25 quarterly sales.

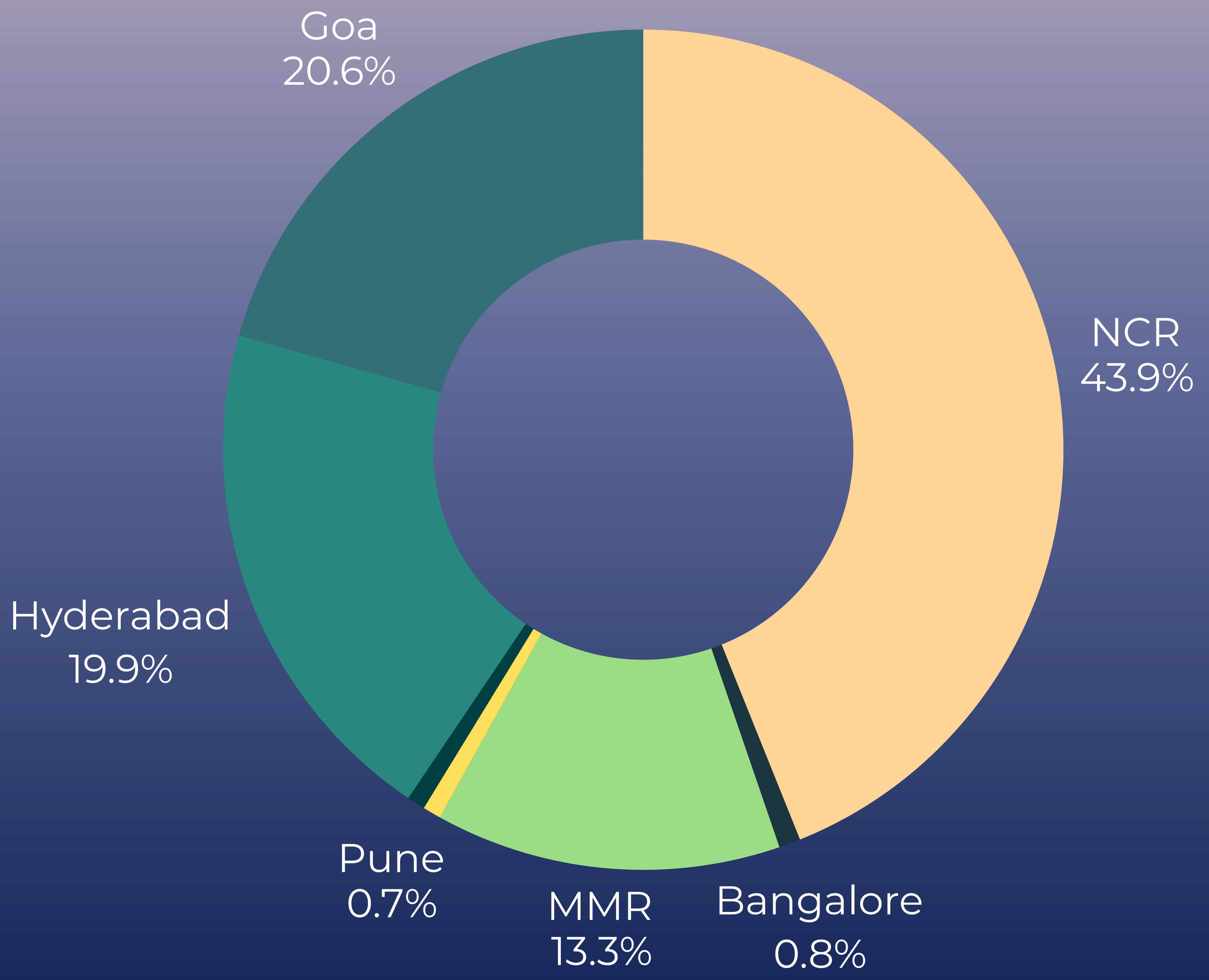
Developer share: last 12 months



- Top 3 developers (6, 3, 12) = 51.19% of market by value.
- Top 5 developers = 70.70% of market by value.
- Two developers recorded zero sales last 12 months: Builder 9, Builder 11.

City share: Jun’25 quarter

- NCR dominates — nearly 44% of quarter sales.
- Three cities (NCR + Goa + Hyderabad) account for ~84.5% of quarter sales — extremely concentrated.
- Secondary cities (Bangalore, Vizag, Pune) are marginal contributors (<1% each) in Jun’25.



Conclusion

- High concentration risk at developer level (Top-5 ≈ 70.7%) and city level (Top-3 ≈ 84.5% for Jun’25).
- Some builders show no activity in last 12 months (Builder 9, 11) — verify validity (inactive projects or missing data).
- City performance suggests NCR is the single largest market, with Goa and Hyderabad also contributing materially for Jun’25.

Thank You