



**SIGNATURE<sup>TM</sup>  
GLOBAL**

REALTY. RELIABILITY. RESPONSIBILITY.

AN ISO 9001:2015; 14001:2015; 45001:2018; 27001:2022 CERTIFIED COMPANY

# Perspectives on Real Estate In Gurugram



# Real Estate sector expected to continue **strong growth momentum**

**Southern Peripheral Road: A real estate hotspot in Gurugram**

 **FINANCIAL EXPRESS**



**Delhi-NCR's real estate market: How homebuyers brought the mojo back**

**Gurugram: South Peripheral Road Emerging As A Game Changer For Real Estate Sector? Key Details**

**TIMES NOW**

**Business Standard** **Surging Demand for Luxury Residential Real Estate in Delhi-NCR: Market Insights and Projections**

**Delhi-NCR real estate will experience exponential growth**

**TOI**

 **FINANCIAL EXPRESS**

**Gurugram emerges as real estate powerhouse in 2023**



**Delhi NCR's Real Estate Market: A Beacon of Growth Amidst Challenges**

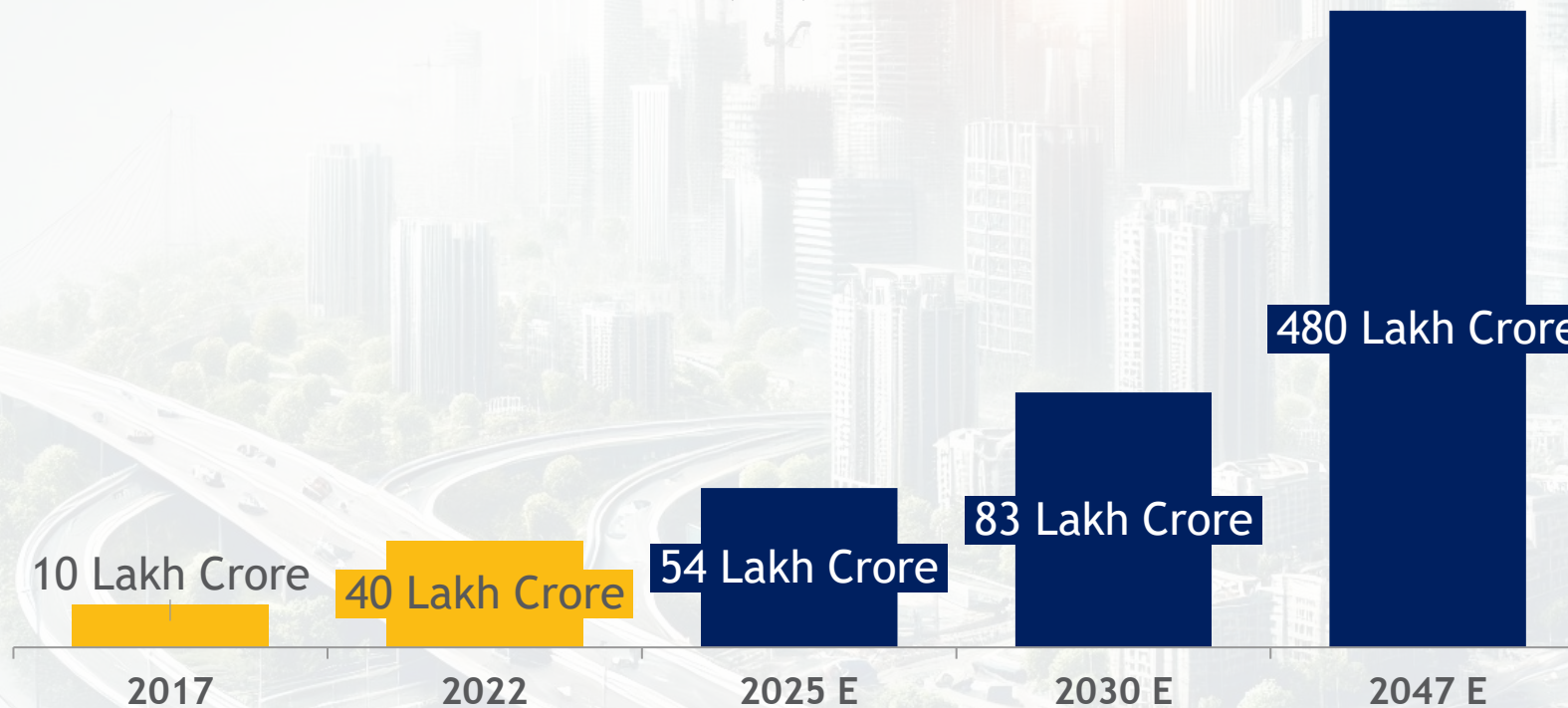


*For internal training purposes only*

# Real Estate sector in India to continue **strong growth momentum**

Housing supply deficit of 2.2 Lakh units expected by 2031

Real Estate Sector Market Size in India (INR)



Real Estate Sector in India estimated to continue growing at 10-12% per year from 2022-2030



# Strong developer fundamentals, rapid urbanization and rising incomes position **India's real estate to grow at a faster pace in comparison to China**



~30%

China's real estate challenges directly linked to already high contribution to GDP

*Real estate contribution to GDP*



Slow pace of urbanization resulting in low housing demand



Overleveraging by developers due to lack of regulatory framework



Disposable incomes stagnant



~7%

High growth potential for real estate with only ~6% contribution to GDP, expected to hit 17% by 2047

*Real estate contribution to GDP*



Rapid urbanization leading to escalating demand for new housing



Strong developer fundamentals, strong regulatory framework & govt support



Disposable incomes rising

Sources:

1. Anarock Research - Real Estate Unboxed;
2. <https://www.moneycontrol.com/news/business/real-estate/all-about-chinas-real-estate-crisis-and-indias-property-market-boom-11553281>



# Real Estate sector in Delhi-NCR to continue **strong growth momentum**

Housing supply deficit of 2.2 Lakh units expected by 2031

42  
Lakh

Expected population  
of Gurugram by 2031<sup>1</sup>

4.3 Lakh

Additional families  
need housing by 2031<sup>2</sup>

2.1 Lakh

Expected supply of  
housing units by 2027<sup>2</sup>  
Avg. of 55,000 units/ year



Housing  
demand at  
**2x**  
of supply

(Considering completed  
housing requirement by  
2031)

Housing  
deficit of

2.2  
Lac+  
units

by 2031

Sources: 1. [GMDA report](#) 2. [Knight Frank Real estate India report 2023](#)

Above estimates with assumption of 65% share of new launches in Gurgaon of total launches in Delhi NCR (basis 2023) and supply rate of new units growing at 10% YoY from 2024 to 2031



## Strong corporate presence in Gurugram to continue supporting demand for high-end and luxury housing

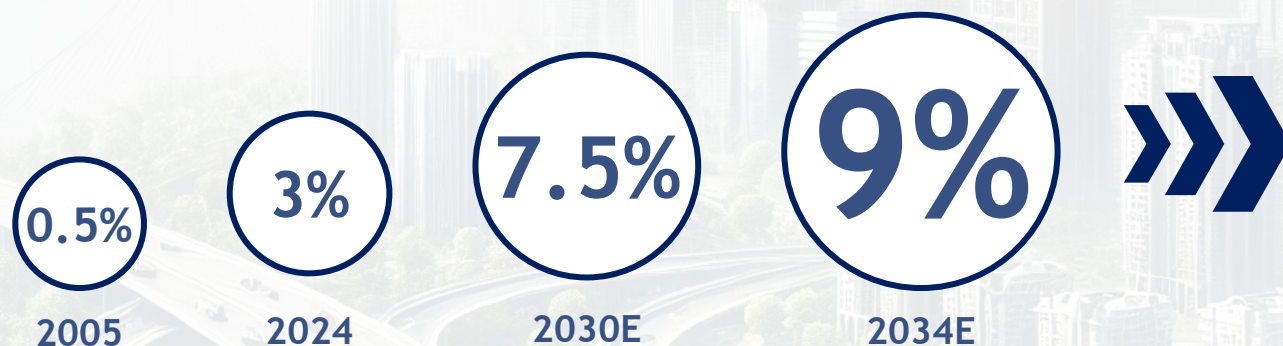
- 60% of office spaces in Delhi NCR are in Gurugram<sup>1</sup>
- HQ of 350+ Fortune 500 companies driving housing demand from C-suite & senior-level employees<sup>2</sup>
- Gurugram is 9<sup>th</sup> biggest income tax-paying city and growing at annual average rate of 20% YoY (2012-21)<sup>3</sup>
- 25% YoY growth in Office space absorption rate in Gurugram (H1 2024 v H1 2023) and expected to continue at similar pace<sup>4</sup>



# Demand for High-end & Luxury segment to surge with change in income levels

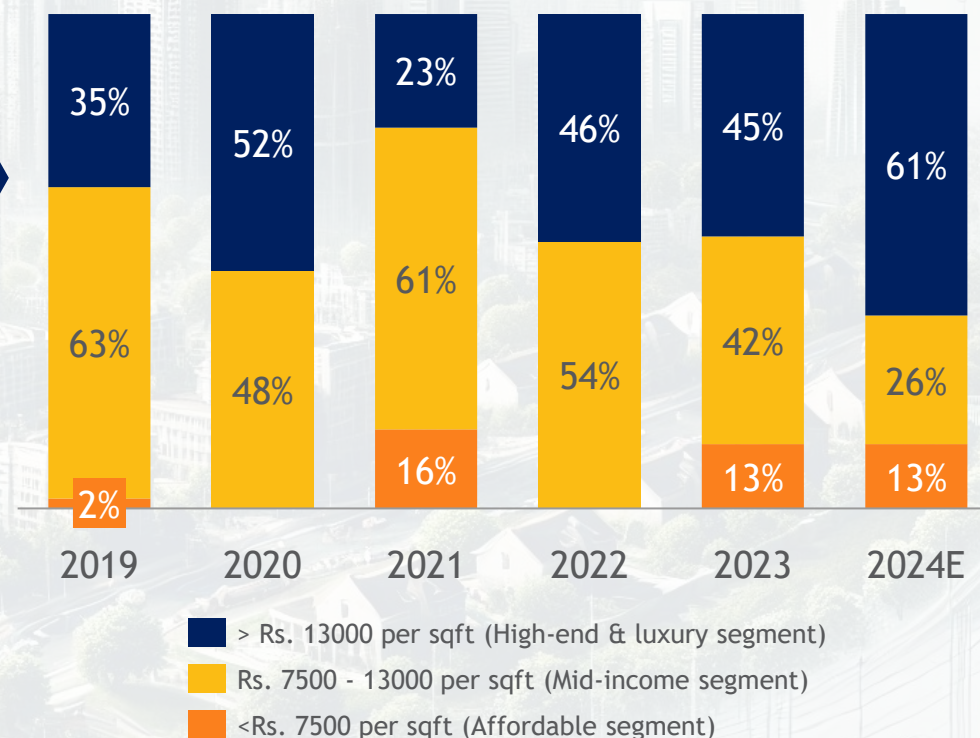
~60% of total demand for housing in 2024 expected to be in the high-end and luxury segment

Share of HNIs<sup>1</sup> and Ultra-HNIs<sup>1</sup> set to triple in India in next decade ('24-'34)...



Gurgaon expected to see addition of **30,000-40,000 HNI & Ultra-HNI families** in the next 3 years (2024-2026)<sup>2</sup>

...leading to sustained demand for high-end and luxury housing in Delhi-NCR



Source: [Knight Frank](#), [Cushman & Wakefield](#)

1. HNIs and Ultra-HNIs defined as individual households with total annual income of more than INR 50 LPA

2. Above estimates considering current Gurugram population and growth of HNIs & Ultra-HNIs in line with estimates for India



# Customer preferences evolving post Covid<sup>1</sup> , with demand for **exclusive & premium amenities** leading to increased customer pull for 3 BHK+ housing

## PRE-COVID



Gated community



Location



Premium Finishes



Exclusive amenities



Square footage

## POST-COVID



Private Elevators



Larger Balcony



Greenery and Sustainability



Dedicated work areas



Healthcare facilities



Gated community



Location



Premium Finishes



Exclusive well being



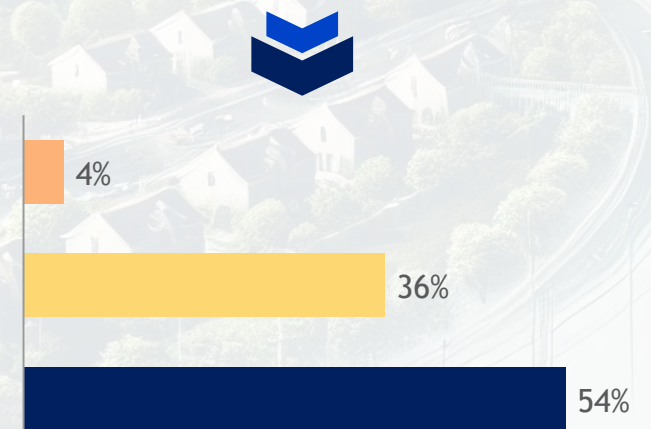
Exclusive amenities

Demand for 3BHK+ housing has increased by 20% in Delhi-NCR<sup>2</sup>

2022



2023



1BHK 2BHK 3BHK+



# Delhi-NCR leading all other major markets in **price appreciation and return on investment for customers**

## **ETNOW** Real Estate Market: Gurgaon surpasses Mumbai in premium segment

### **Superior ROI: Gurgaon's Winning Formula Makes it the Rising Star in Premium Real Estate**

Gurgaon's premium real estate market has demonstrated a robust growth trajectory, particularly in regions such as Dwarka Expressway, New Gurgaon, and Southern Peripheral Road (SPR). Post-pandemic, property prices in these areas have appreciated by an impressive 25% to 30%, according to ANAROCK Property Consultants. This significant

◆ APN NEWS

## **Business Standard** Housing prices up 83% along Dwarka Expressway; may rise further: Experts

Gurgaon witnessed highest increase in residential property prices among top 10 cities

THE ECONOMIC TIMES

**Gurgaon Real Estate: Property Price Jumps 78.3% Since 2020 Along Southern Peripheral Road**

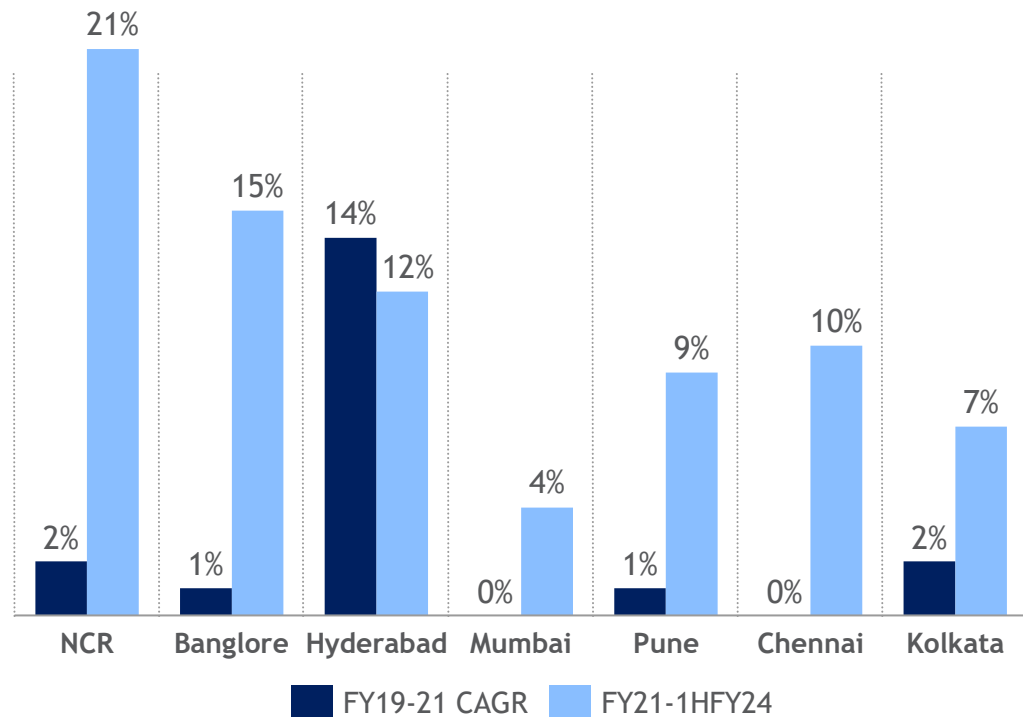
**NEWS 18**

**Gurgaon Real Estate: Unprecedented demand surge, supply shortage reshape market dynamics**

◆ **FINANCIAL EXPRESS**

# Price Appreciation | Delhi-NCR leading hike in for real estate prices across the country; Gurugram pricing continues to be more attractive vs. Delhi

Real Estate Price Growth (%)  
Delhi-NCR leading all other major markets



Difference in Gurugram and Delhi prices offers unique advantage for customers to maximize gains

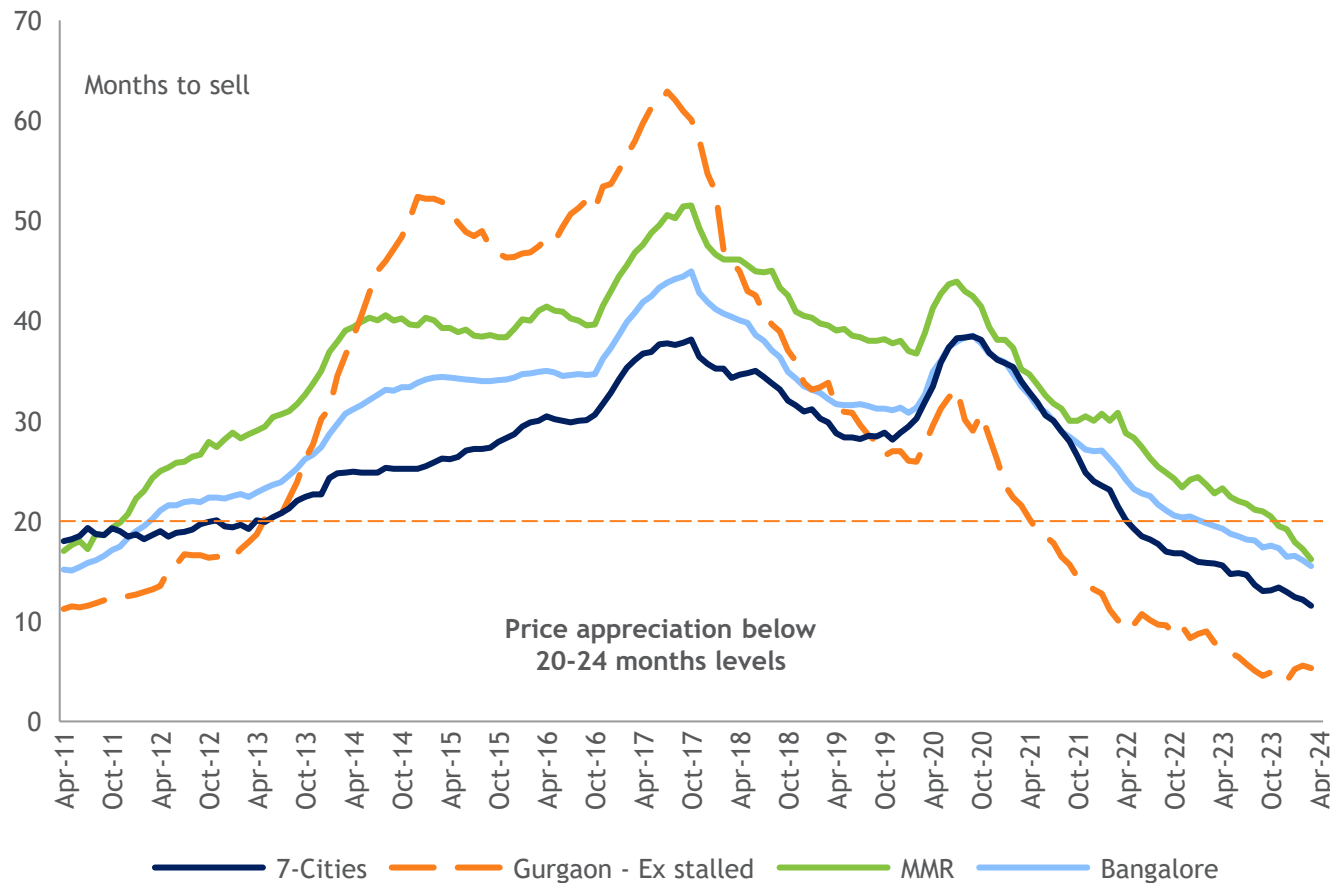
	Delhi	Gurugram
<b>Plot Rates (INR/sqft)<sup>2</sup></b> For 1500-2000 sq.ft. residential plot	<b>40-60k</b> <i>Subroto Park, Rajouri Garden Hauz Khas</i>	<b>15-30k</b> <i>SPR, Golf Course Ext., MG Road</i>
Modern infrastructure	✗	✓
Wide-road network	✗	✓
World-class amenities	✗	✓

Source: 1. Avendus Spark report; 2. Residential plot price benchmarking from real-estate rate providers (99acres.com, Magic Bricks)



# Gurugram leading all other major markets in absorption of available inventory, reflecting strong momentum in the housing market

Residential inventory trend in key cities



**Inventory sell-out fastest in Gurugram** vs. any other major city (5-6 months sellout time)

**Time required for price appreciation lowest in Gurugram** vs. any other city (12-24 months)

**Gurugram only city to offer dual advantage to customers vs. any other city:**

- 1. World-class amenities at lower pricing**
- 2. Faster price appreciation**

# Increased government spending on infrastructure aimed at boosting demand and growth of residential market in Gurugram



## Infrastructure push by Central Government with increased outlay<sup>1</sup>

Interim budget 2024-25 earmarks ₹ 11.1 lakh crore, showcasing strong governmental support for infrastructure growth



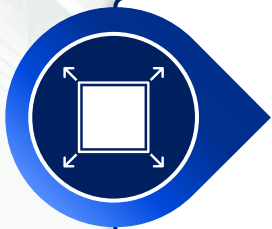
## Central Government's support for State projects<sup>1</sup>

₹ 1.3 lakh Cr in 50-year interest-free loans dedicated to state infrastructure development to drive continuous investment and stability in state level projects



## Haryana Governments' commitment towards CapEx<sup>1</sup>

- Haryana's budget allocation of ₹16.3k Cr Capex in 2024-25 aligns with the central government's infrastructure push
- Capital Outlay on Urban Development (Haryana) is Rs. 606 Cr for 2024-45



## Housing sector development priority for all stakeholders<sup>2</sup>

- Infrastructure development remains a priority across all civic bodies & government agencies
- Continued focus on increasing affordability in the housing sector



# SPR and Sector 71: “The Heart of Gurugram”

## Southern Peripheral Road Emerging as the Heart of Gurugram Real Estate **Business Standard**



**Proposed Metro Line<sup>1</sup>:** New SPR Metro Line connecting key public hotspots, enhancing commute convenience for residents to be a marquee attraction



**Global City Project<sup>2</sup>:** A 1,000-acre mixed-use development with workspaces, retail, and social infrastructure, fostering a vibrant community hub with focus on positioning SPR at Heart of Gurugram



**Delhi-Alwar RRTS and Manesar MRTS<sup>3</sup>:** Metro lines linking Rajiv Chowk, SPR, Vatika Chowk, and extending to Manesar, improving regional connectivity



**Proposed Air Taxi Service<sup>4</sup>:** Delhi to Gurugram route proposed reducing travel time to 7 minutes



**Elevated Road Proposal<sup>5</sup>:** From Vatika Chowk to Clover Leaf (SPR) improving connectivity across SPR

## Sector 84: “Rising residential star in Gurugram”

### The fast-paced growth of Sector 84: Gurugram’s rising residential star

Construction  
Week



**Proximity to SPR and NH 8:** First sector in New Gurgaon while driving in from Dwarka Expressway; only 5 minutes away from NH8 and SPR



**Enhanced connectivity:** New Inter-State Bus Terminus proposed in sector 84; in-close proximity to proposed Heliport, Global City And RRTS Corridor



**Next to Commercial Sector 88:** 200 acres of commercial land with major landholdings of DLF, Bestech And AIPL; 5 Star Hotels, Big Markets, SCOs proposed in this sector



**Developed Infrastructure In Vicinity:** Major schools such as DPS and Matrikiran; Strong community presence and families moving-in in the projects completed in the last 4-5 years



---

How is  
**Signature**  
**Global** best  
positioned for  
success?

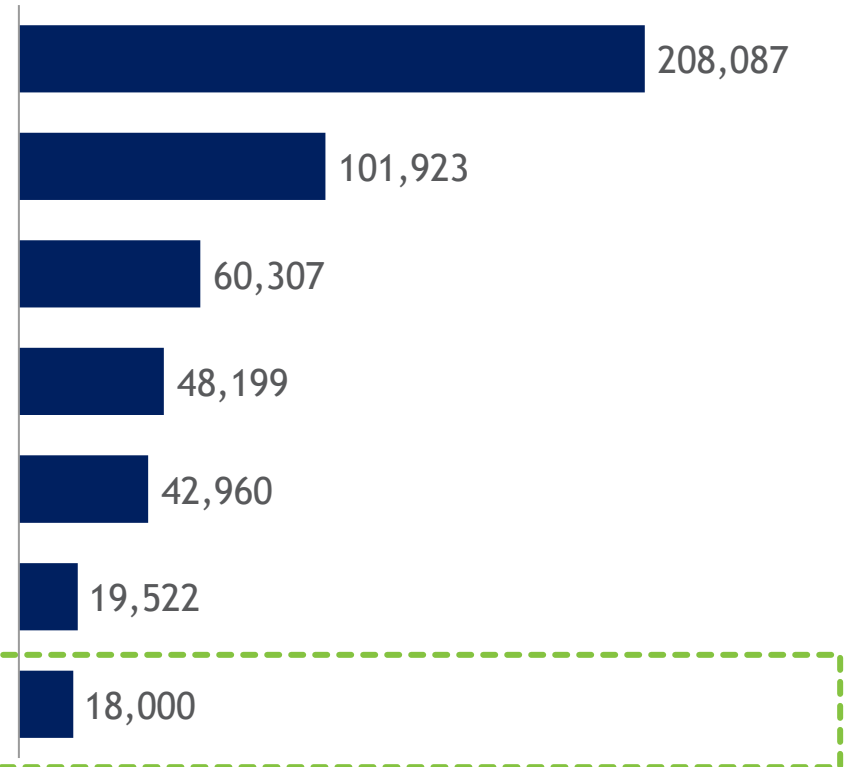
---







# In the top 7 real estate companies basis market capitalization<sup>1</sup>



In INR Cr.





# 5th highest pre-sales registered in FY24

**Godrej** | PROPERTIES

22,500

**Prestige**  
GROUP  
Add Prestige to your life

21,040

**LODHA**  
BUILDING A BETTER LIFE

14,500

**DLF**

13,316<sup>1</sup>

**SIGNATURE**  
GLOBAL  
REALTY. RELIABILITY. RESPONSIBILITY.

7,270

In INR Cr.

1. DLF pre-sales registered till Q3FY24





**Rising stars!!** Soaring heights in a decade..

**At the forefront of the real estate industry in the last 10 years**

**30%** market share in Gurgaon and **19%** in Delhi-NCR in under a decade!

*\*In the affordable & lower mid income*



# Signature Global is expanding footprint across micro-markets

Expansive land parcels in 4 key micro-markets



Sector 71 (15.9 mn sq ft)



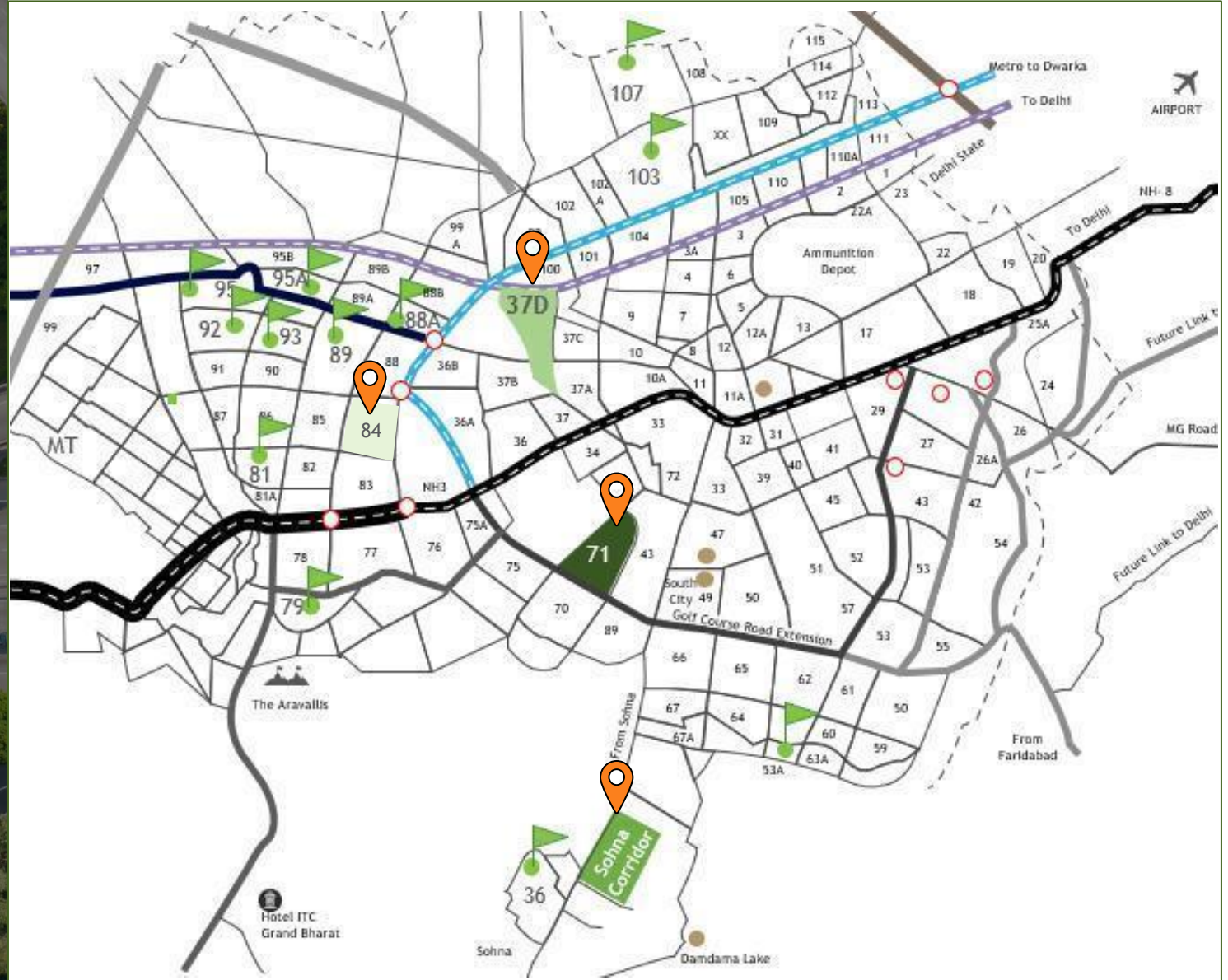
Sector 84 (1.5 mn sqft)



Sohna Elevated Corridor (9 mn sq ft)



Sector 37D (4.6 mn sq ft)







**SIGNATURE<sup>TM</sup>  
GLOBAL**

REALTY. RELIABILITY. RESPONSIBILITY.

AN ISO 9001:2015; 14001:2015; 45001:2018; 27001:2022 CERTIFIED COMPANY

**Thank you**