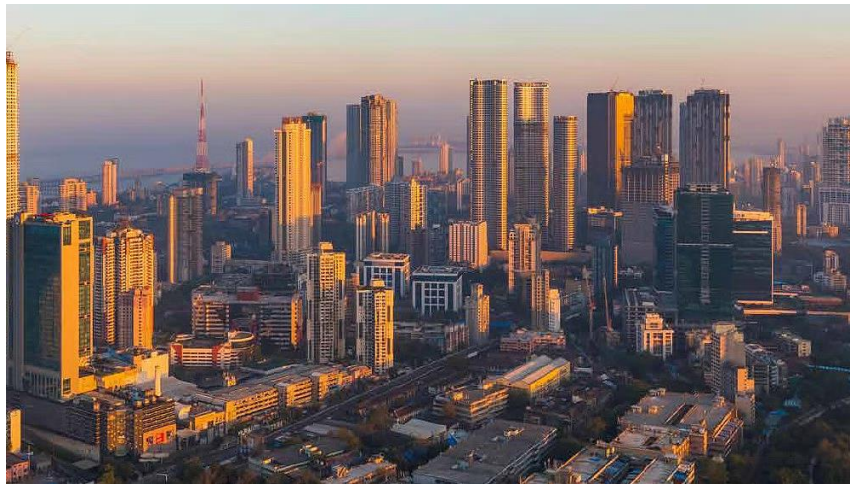


INDIA'S REAL ESTATE MARKET IS SHIFTING FROM VOLUME TO VALUE

Institutional capital, premium housing demand, infrastructure-led appreciation and technology-driven execution are reshaping India's next real estate growth cycle.



India's real estate market moves into a more organised, value-led phase

India's real estate market is increasingly moving into a more organised, value-driven phase. Institutional capital is entering with greater conviction, premium housing continues to outperform, and infrastructure corridors are redrawing demand patterns.

Organised execution is becoming a decisive differentiator. While affordability pressures remain, buyer aspiration, urbanisation and investor confidence continue to sustain momentum across India's residential and commercial markets.

MARKET SNAPSHOT

India's housing market is shifting decisively toward value, institutional capital and organised execution.

₹9.33 Lakh Cr

Housing sales by value across India's top 75 cities in FY26

24%

Rise in average home prices across top cities (Jan-Mar)

12,315

Mumbai property registrations in May — highest in 14 years

₹1,070 Cr

SM REIT AUM expansion by Property Share

6 Lakh sq ft

L&T Mindtree office lease in Chennai

₹237 Cr

Record price for one-acre Raidurg land parcel, Hyderabad

CAPITAL & INVESTMENT



Housing sales touch ₹9.33 lakh crore despite flat volumes

PAGE 02

COMMERCIAL MOMENTUM



GCCs, office leasing and premium workspaces keep expanding.

PAGE 03

BUYER SHIFT



Realty Ups Luxe Quotient With Premium Brands

PAGE 06

EXPERT TAKE

“ India's real estate market is no longer merely about supply and demand — it is increasingly about trust, execution, capital efficiency and long-term value creation. ”

Capital is flowing back into Indian real estate.

Cross-border institutions, family offices and HNIs are deepening conviction across India's organised real estate platforms.



01

BUSINESS STANDARD 29 May 2026

[Development Bank of Japan debuts in India realty market](#)

Institutional capital participation deepens as the Development Bank of Japan makes its first India real estate commitment, backing HDFC Capital's affordable and mid-income H-DREAM Fund. Global investors increasingly view India as a structurally long-term growth opportunity.

JUSTO SIGNAL

Cross-border institutional capital is validating India's organised real estate opportunity.

02

BUSINESS STANDARD 29 May 2026

[Godrej, JSW family offices invest in SILA platform](#)

Family office participation in organised real estate platforms accelerates as Godrej, JSW, Lodha and Sattva back SILA, following Permira's \$100 million round. The investment reinforces confidence in execution-led, asset-light, platform-based models.

JUSTO SIGNAL

Execution platforms are emerging as the next investable category.

03

ECONOMIC TIMES 30 May 2026

[Housing sales touch ₹9.33 lakh crore despite flat volumes](#)

India's housing market continues shifting toward a value-led cycle, with sales across the top 75 cities rising 16% by value to ₹9.33 lakh crore in FY26 even as volumes moderate. Premium and luxury inventory is driving overall value.

JUSTO SIGNAL

India is witnessing premiumisation, not slowdown.

04

ECONOMIC TIMES 30 May 2026

[HNIs turn to premium real estate for wealth preservation](#)

High-net-worth investors are increasingly allocating capital toward premium housing as market volatility and inflation concerns reposition real estate as a stable wealth-preservation asset beyond traditional equities.

JUSTO SIGNAL

Premium housing is becoming an alternative wealth strategy.

India's office story is being rewritten by GCCs.

Global capability centres, premium workplaces and resilient absorption continue to anchor India's commercial real estate.



01

ET REALTY 28 May 2026

[Large-format GCC leasing keeps powering office demand](#)

Large-format leasing continues to indicate confidence in India's office market, particularly among GCCs and enterprise occupiers anchoring demand for Grade-A ecosystems across leading metros.

JUSTO SIGNAL

Enterprise demand remains strong for Grade-A office ecosystems.

02

FREE PRESS JOURNAL 28 May 2026

[BKC set for strong office stock growth by 2029](#)

Mumbai's flagship commercial district continues to see strong expansion driven by sustained occupier demand and institutional interest, reinforcing premium office corridors as long-term compounding assets.

JUSTO SIGNAL

Premium office corridors continue compounding value.

03

ECONOMIC TIMES 26 May 2026

[Vacancy levels in India office market expected to fall](#)

Commercial absorption momentum continues strengthening across leading cities, with occupiers expanding footprints and institutional landlords competing for high-value enterprise tenants.

JUSTO SIGNAL

India's office market remains structurally resilient.

04

THE HINDU BUSINESS LINE 25 May 2026

[GCC Growth Spreads Beyond Metros as Tier-II Cities Attract Global Enterprises](#)

Global enterprises are increasingly evaluating emerging cities for cost efficiency and talent depth, broadening India's commercial real estate growth beyond the traditional tier-1 metros.

JUSTO SIGNAL

Commercial real estate growth is broadening geographically.

Infrastructure is redrawing India's next winners.

Metro expansion, land-value discovery and redevelopment are creating entirely new demand corridors across India.



01

FREE PRESS JOURNAL 27 May 2026

MMRDA seeks ₹9,950 crore loan for metro expansion

MMRDA has begun raising up to ₹9,950 crore for Metro Lines 5A and 12A, adding roughly 19 stations linking Kalyan, Ulhasnagar and Navi Mumbai. Metro connectivity continues unlocking long-term appreciation across Mumbai corridors.

JUSTO SIGNAL

Infrastructure precedes appreciation.

02

THE HINDU 29 May 2026

Raidurg land sells for record ₹237 crore per acre

A 6.29-acre TGIIC parcel in Hyderabad's Raidurg corridor fetched a record ₹237 crore per acre — 70.5% above reserve — taking the total to ₹1,490 crore. Land pricing continues to reflect office demand and infrastructure conviction.

JUSTO SIGNAL

Land pricing reflects long-term city conviction.

03

BUSINESS STANDARD 26 May 2026

Realty Boom Risk: Can Buyer Demand Absorb a 5-Year High in Housing Supply?

Urban redevelopment continues emerging as one of Mumbai's biggest long-term growth themes, unlocking developable land and fresh housing supply across the metropolitan region.

JUSTO SIGNAL

Redevelopment is Mumbai's next growth engine.

04

TIMES OF INDIA 25 May 2026

Kalpataru Inks ₹1,250 Crore GDV Redevelopment Project in Mumbai

Cities beyond the metros are attracting institutional and end-user attention, supported by improving connectivity, affordability and talent depth — decentralising India's real estate growth.

JUSTO SIGNAL

Growth is decentralising.

Real estate is becoming an execution and intelligence business.

AI-led approvals, data intelligence and organised execution platforms are reshaping speed, transparency and delivery.



01

FREE PRESS JOURNAL 27 May 2026

[BMC Gets Nod for AI-Powered 'CIVIT TWIN' Building Approval System](#)

Mumbai's civic authorities are moving toward AI-enabled building approvals through the CIVIT TWIN system, aimed at improving transparency, reducing delays and accelerating project clearances.

JUSTO SIGNAL

Technology will increasingly compress approval timelines and improve project predictability.

02

ECONOMIC TIMES 27 May 2026

[Property Share Expands SM REIT Footprint With ₹1,070 Crore AUM](#)

Technology-led investment platforms are helping institutional and retail investors access professionally managed real estate assets through data-led underwriting, portfolio visibility and transparent reporting systems.

JUSTO SIGNAL

Real estate investing is becoming increasingly platform-led, measurable and data transparent.

03

ECONOMIC TIMES 26 May 2026

[Construction Costs for Realty Projects Rise Over 25%](#)

Digital intelligence and structured execution are increasingly attracting institutional capital, with execution-focused B2B platforms drawing the bulk of recent proptech funding.

JUSTO SIGNAL

Execution capability is becoming the moat.

04

BUSINESS STANDARD 25 May 2026

[War Impact: Construction Costs Rise, Delivery Timelines Face Pressure](#)

Global supply disruptions are affecting timelines and procurement cycles across projects, increasing the importance of disciplined execution and proactive project management.

JUSTO SIGNAL

The future of real estate belongs not only to builders — but to faster, smarter executors.



The Indian homebuyer is more aspirational and selective.

Premiumisation, lifestyle-led formats and shifting urban preferences continue to redefine residential demand.

01

FINANCIAL EXPRESS 28 May 2026

Realty Ups Luxe Quotient With Premium Brands

Developers continue introducing luxury partnerships and branded living concepts to attract aspirational buyers seeking exclusivity, lifestyle integration and long-term value.

JUSTO SIGNAL

Premiumisation is no longer cyclical — it is becoming structural.

02

TOI 27 May 2026

Buying a Home? Check if You Qualify for PMAY Urban 2.0 Benefits

Affordable housing demand remains supported through policy interventions even as input costs rise, keeping the affordability conversation firmly anchored in government-led mechanisms.

JUSTO SIGNAL

Affordability remains policy-driven.

03

REALTY PLUS 26 May 2026

Senior living and lifestyle housing emerge

Buyers increasingly seek wellness-led and managed living formats. Demographic shifts and rising disposable incomes are unlocking entirely new residential categories beyond the primary home.

JUSTO SIGNAL

Housing categories are diversifying.

04

CONSTRUCTION WORLD 29 May 2026

Senior Living Moves Beyond Retirement Housing

Senior living formats are evolving beyond conventional retirement communities into wellness-led, managed lifestyle ecosystems designed around convenience and assisted living.

JUSTO SIGNAL

Residential categories are becoming increasingly specialised and experience-driven.

THE JUSTO LENS

A proprietary editorial perspective on the week's developments

The Premiumisation of Indian Real Estate Is No Longer Cyclical — It Is Structural

India's housing market is quietly undergoing a deeper reset.

What appears on the surface as a luxury boom is, in reality, a structural shift in buyer behaviour, capital deployment and execution quality. Homebuyers today are more informed, selective and aspiration-driven. Investors are chasing trust, organised execution and long-term resilience rather than speculative upside.

At the same time, institutional capital is increasingly favouring platforms capable of consistent execution over fragmented models. Commercial occupiers are prioritising intelligence-led, experience-rich workspaces. Infrastructure is no longer supplementary — it is foundational. Value creation belongs to organised players who combine execution, data, technology and trust.

WHAT THIS MEANS

India's next real estate winners may not simply own inventory — they will own execution capability, customer trust and speed of delivery.

Stay Ahead. Stay Informed.

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