

Publication

This document was produced in July 2018. The data used in the tables and charts is the latest available at the time of publishing. Data sources are included for all the charts. We have detailed what we believe to be an accurate snapshot of the current market.



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DUBAI DOWNTOWN

LOCATION OVERVIEW

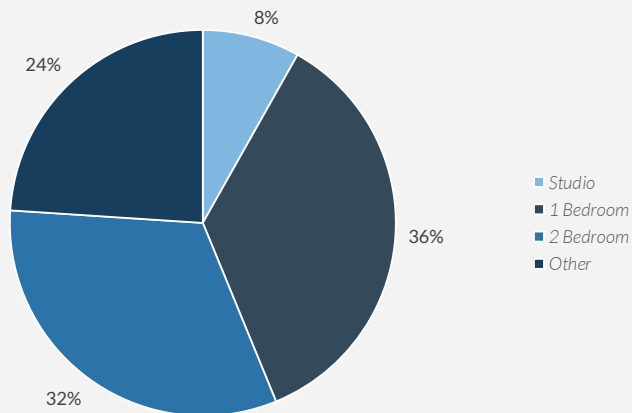
This report analyses studio, one, and two-bedroom unit typologies within the secondary residential market, through this publication we assess the performance of the sales and rental market and aim to highlight any key trends.

The Dubai Downtown rental market was shy against the previous quarter. After almost a year of negative compression Q2 witnessed some of its best results within the past year, one-bedroom units produced a rental rate increase of 0.64 percent. In contrast, studio apartments saw a significant downturn of 7.8 percent compared to Q1, maintaining their historical volatile behaviour within the market.

Sales transactions increased by 30% compared to Q1, however prices remained 3 percent shy compared with the start of the year. One-bedroom apartments showed the least compression remaining more or less identical whilst, confirming that this typology has the most demand within the area for both investors and end users.

With more than 11,000 units in the pipeline, the supply fallacy should raise some awareness for investors. With significant construction in the area, choosing the most profitable investment proves to be challenging. We expect volatility in the area to remain high until construction begins to slow and more apartments are complete.

Unit Distribution



< Stock delivered in Q2 2018

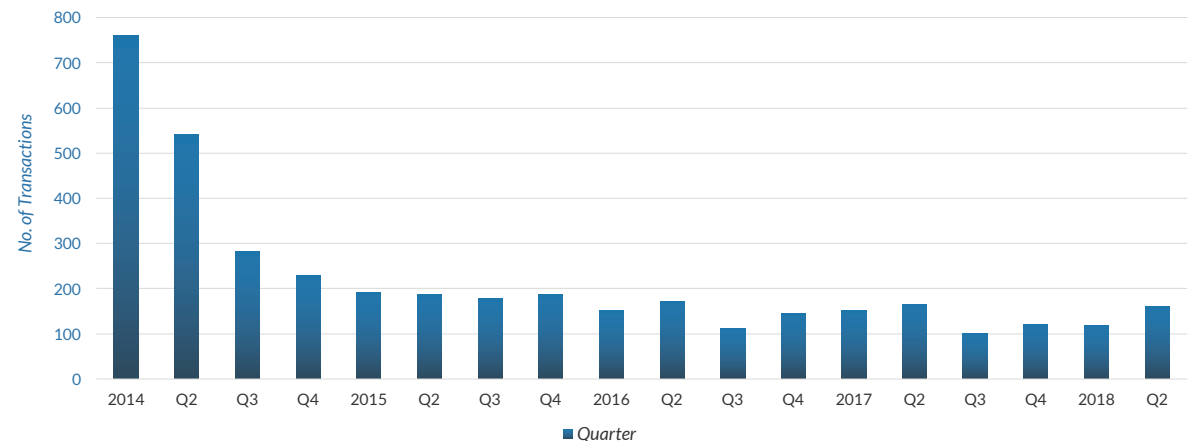


0
Project



0
Units

< History of Total Sales Transactions





SUPPLY ANALYSIS

Total No. of
Completed Buildings
(Apartment only)

83

Total No. of
Residential Units
(Apartment only)

12,001

No. of
On-going Projects
(Within 5 years)

24

No. of Units
Under Construction
(Within 5 years)

11,219

Rental Rates

USD / sq.ft / Year



BUILDING NAME	STUDIO		1 BEDROOM		2 BEDROOM	
	From	To	From	To	From	To
29 Burj Boulevard - 1	38	43	27	34	26	36
8 Boulevard Walk	27	35	19	32	18	23
Boulevard Central Towers - 1	24	24	28	33	26	29
Burj Al Nujoom	26	37	22	25	16	22
Burj Views - Tower A	29	29	21	31	22	26
Claren Tower 1	36	46	28	34	23	29
Miska 3*					30	36
South Ridge Towers - 1*			26	29	27	28
South Ridge Towers - 5*			25	32	24	30
Standpoint Towers - 1	37	49	23	39	24	29
The Signature*			27	31	23	28

(*) Tables that contain missing data is a result of the particular tower not supporting that specific type of unit or insufficient data is available for the quarter.

Sales Prices

USD / sq.ft



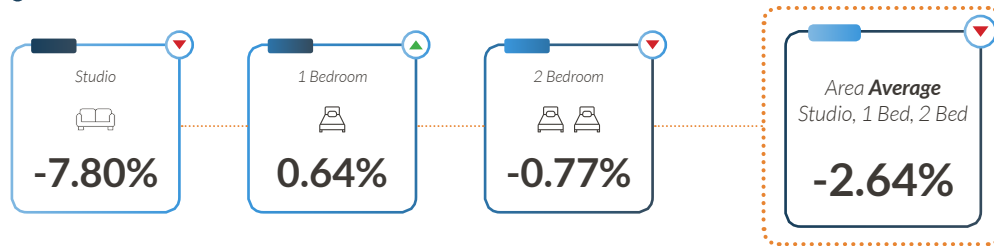
BUILDING NAME	STUDIO		1 BEDROOM		2 BEDROOM	
	From	To	From	To	From	To
29 Burj Boulevard - 1	512	575	489	562	397	634
8 Boulevard Walk	395	466	301	430	326	430
Boulevard Central Towers - 1*			424	548	452	534
Burj Al Nujoom	425	493	329	419	274	384
Burj Views - Tower A	384	384	342	438	370	489
Claren Tower 1	498	526	329	502		
Miska 3*			476	476		
South Ridge Towers - 1*			429	429	494	548
South Ridge Towers - 5*			356	411	427	565
Standpoint Towers - 1	509	575	493	570	459	562
The Signature*	555	555	381	507		

(*) Tables that contain missing data is a result of the particular tower not supporting that specific type of unit or insufficient data is available for the quarter.

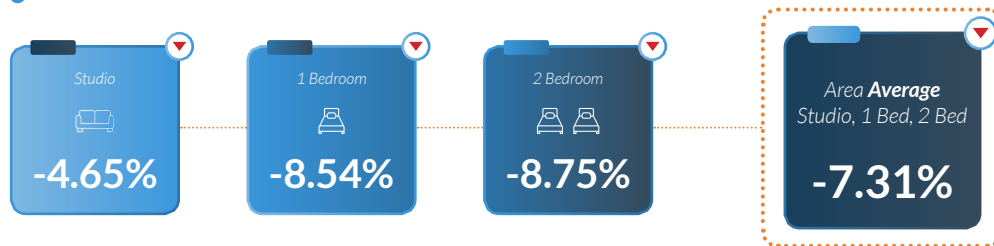
RENTAL RATES

Analysis

RENTAL RATES Q2 2018 vs Q1 2018

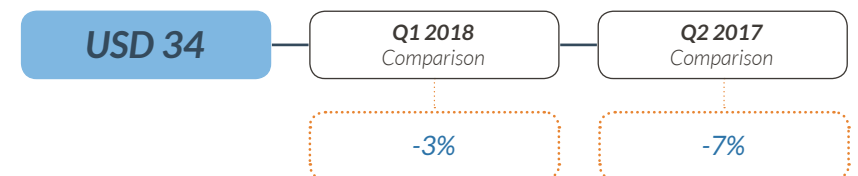


RENTAL RATES Q2 2018 vs Q2 2017



Q2 AVERAGE RENTAL RATE

USD sq.ft / Per Year

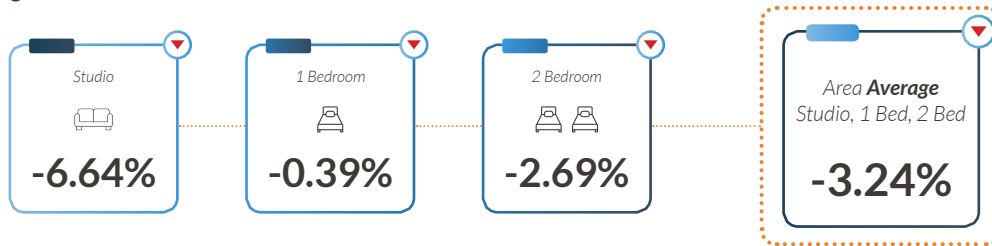


*Source: REIDIN, Dubai Land Department

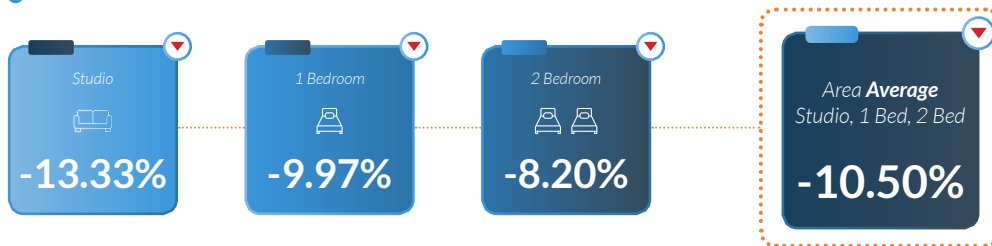
SALES PRICES

Analysis

SALES PRICES Q2 2018 vs Q1 2018

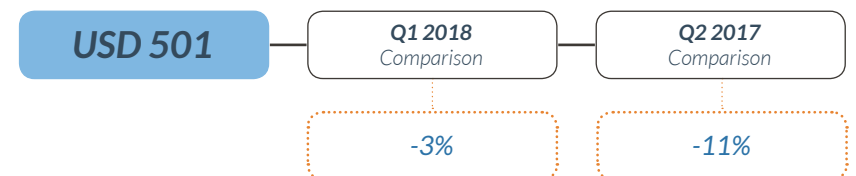


SALES PRICES Q2 2018 vs Q2 2017



Q2 AVERAGE SALES PRICES

USD sq.ft



*Source: REIDIN, Dubai Land Department



Q2 Sales Transactions Based on Ready Properties >



21

SALES PRICES
Alternative Units USD / Sq.ft

Affordable

239 - 585

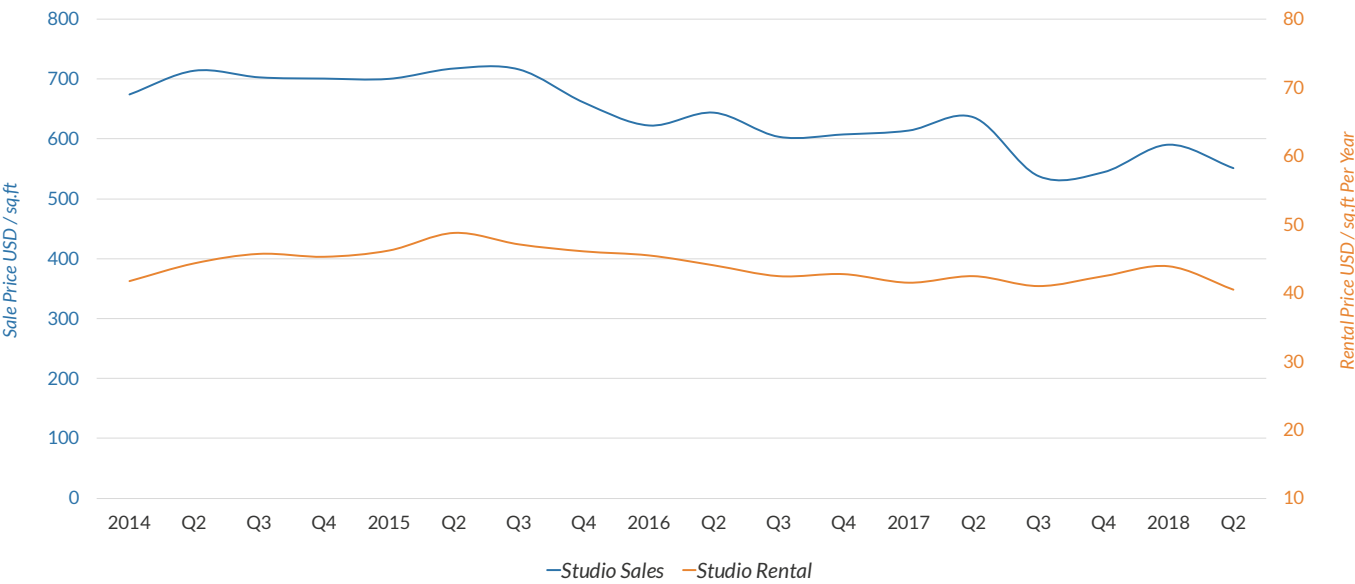
Mid to High End

585 - 757

High to Luxury

757 - 1,102

Sales Prices & Rental Rates >



ONE-BEDROOM APARTMENTS

Unit Type Analysis



Q2 Sales Transactions Based on Ready Properties >



68

SALES PRICES

Alternative Units USD / Sq.ft

Affordable

193 - 511

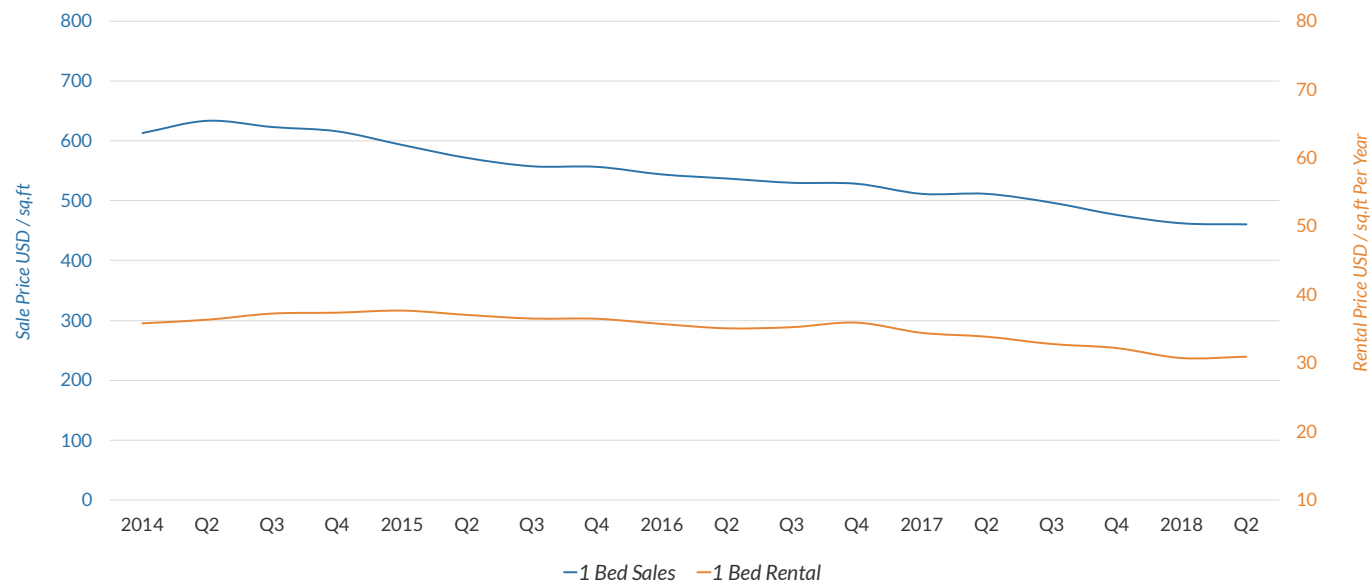
Mid to High End

511 - 591

High to Luxury

591 - 1,465

Sales Prices & Rental Rates >



TWO-BEDROOM APARTMENTS

Unit Type Analysis



Q2 Sales Transactions Based on Ready Properties >



57

SALES PRICES

Alternative Units USD / Sq.ft

Affordable

204 - 588

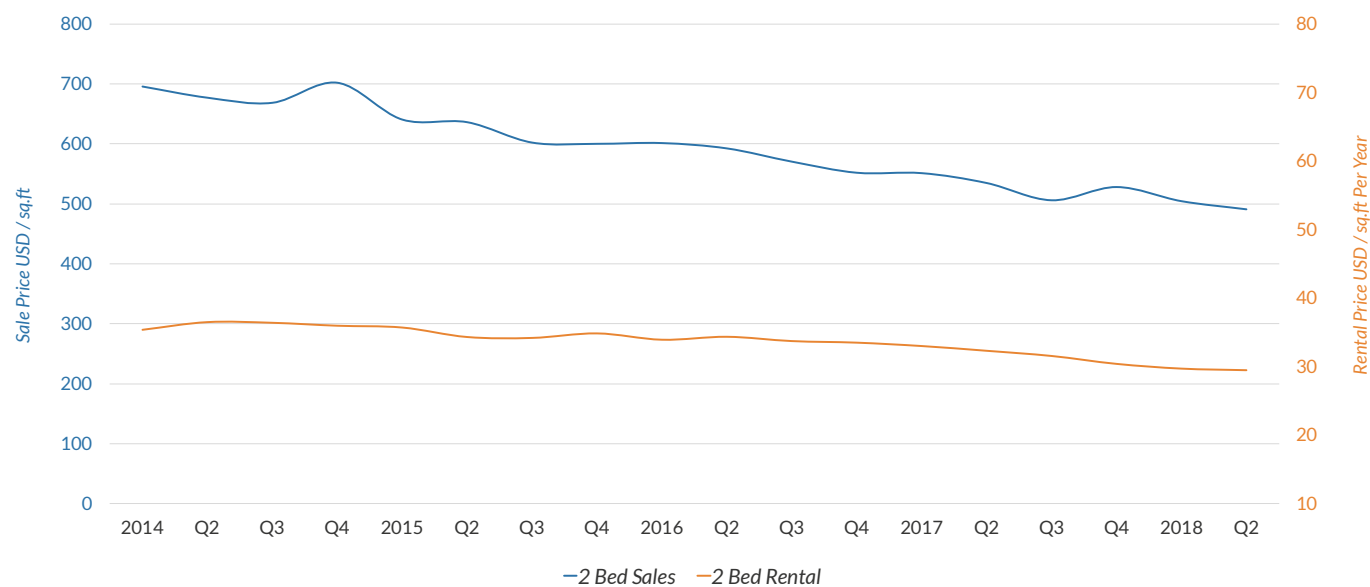
Mid to High End

588 - 684

High to Luxury

684 - 1,547

Sales Prices & Rental Rates >



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With a cumulative 50 years of wealth management experience of which 20 years have been in the UAE, our team has a true understanding and a real capability to select the best investment opportunities.

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*"We build a unique investment experience
by producing profitable growth
and peace of mind."*

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