

Opportunity for Acquisition of a Marquee Property

FORT Division in A Ward, Mumbai

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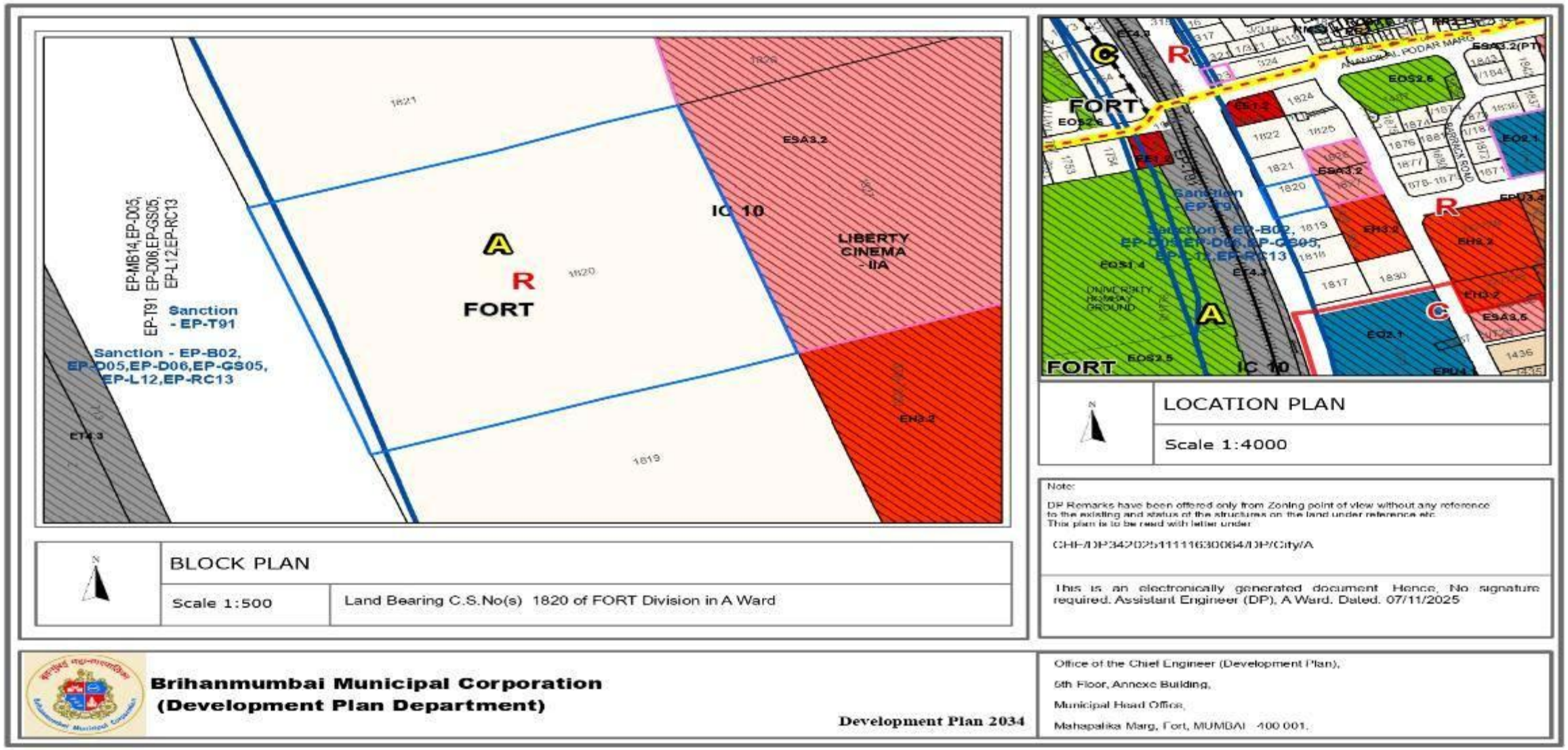
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Property Overview

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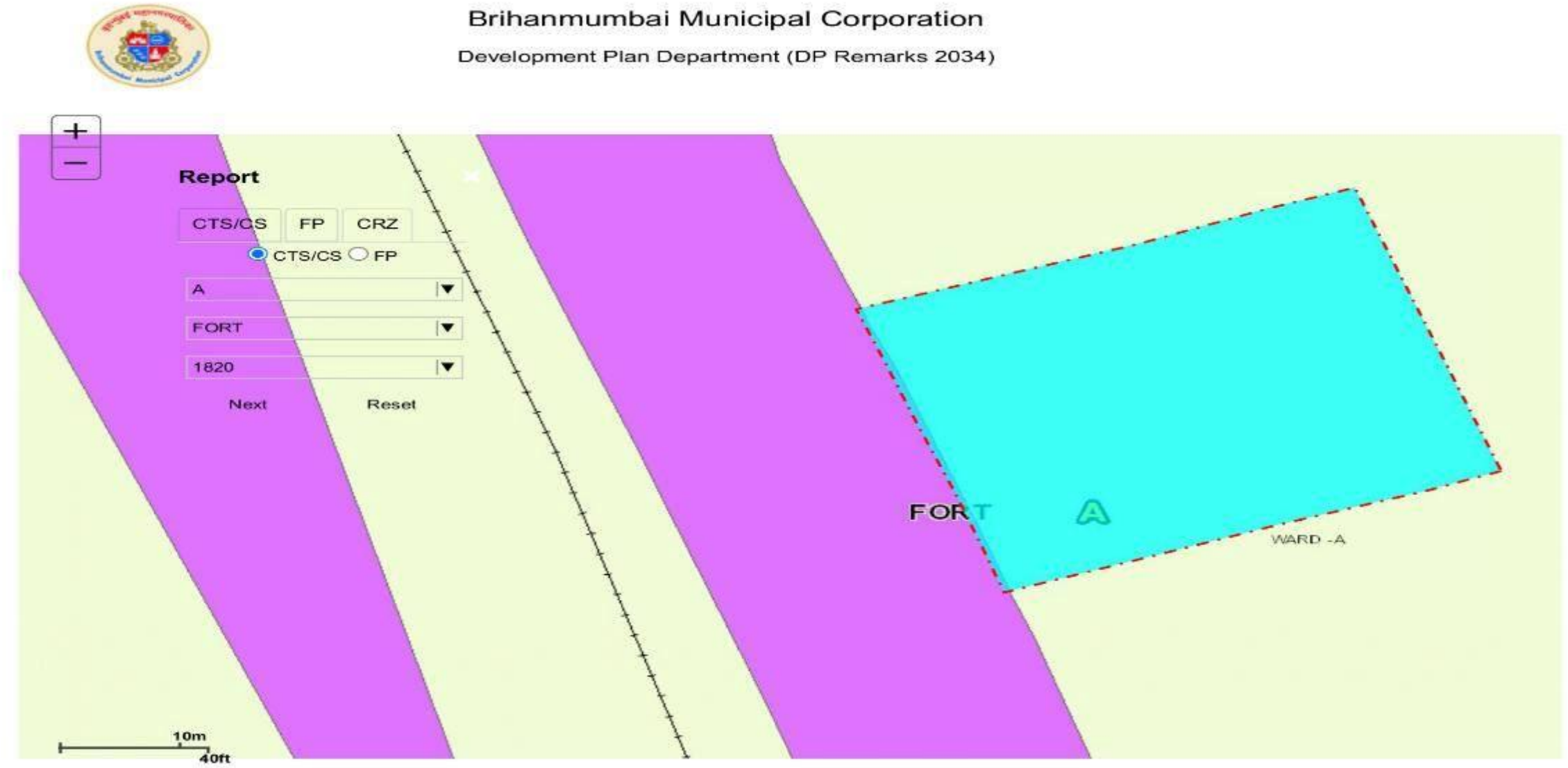
Property Highlights



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DP Remarks & Highlights as per Development Plan 2034



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Annexure: Mumbai Market Overview

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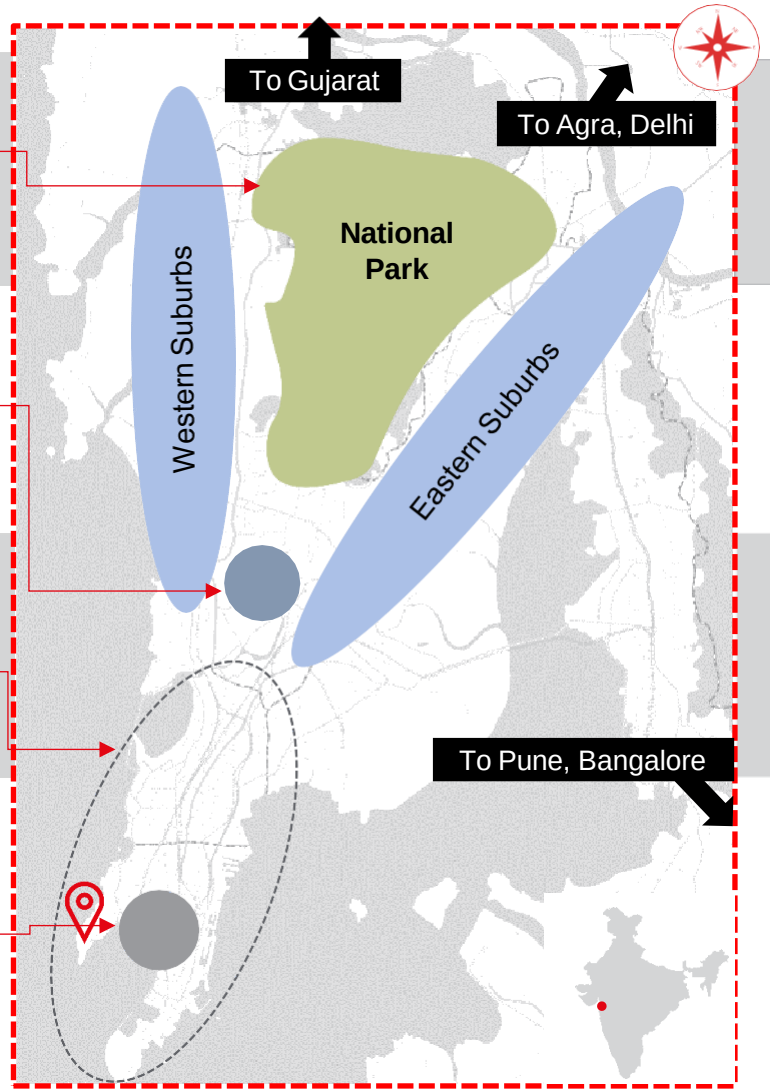
Mumbai City Orientation

National Park

Domestic and International Airport

Original Island City

Traditional Business



Clearly dividing the Suburbs into East and West

As the city grew, the suburbs started getting denser

City started from the southern most point and expanded northwards

Currently called as the Central Business District

Total Area
4,355 Sq.Km.

Population
22 Mn

GDP
$368 Bn

GDP Growth Rate
12%

Per Capita Income
$2,845

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Mumbai Infrastructure Update – Metro Network

The upcoming metro network will substantially improve connectivity for South-Central Mumbai to all other parts of the City. The site's proximity to the Girgaon Metro station on the under-construction underground Metro Line 3 (Colaba-Bandra-SEEPZ) will lend excellent metro connectivity to all parts of Mumbai from the Subject Property.

Metro 1: Versova to Ghatkopar

Year	Probability
2014	Operational

Metro 2A: Dahisar to DN Nagar

Year	Probability
2022	High

Metro 2B: DN Nagar to Mankhurd

Year	Probability
2022	High

Metro 3: Colaba – Bandra – SEEPZ

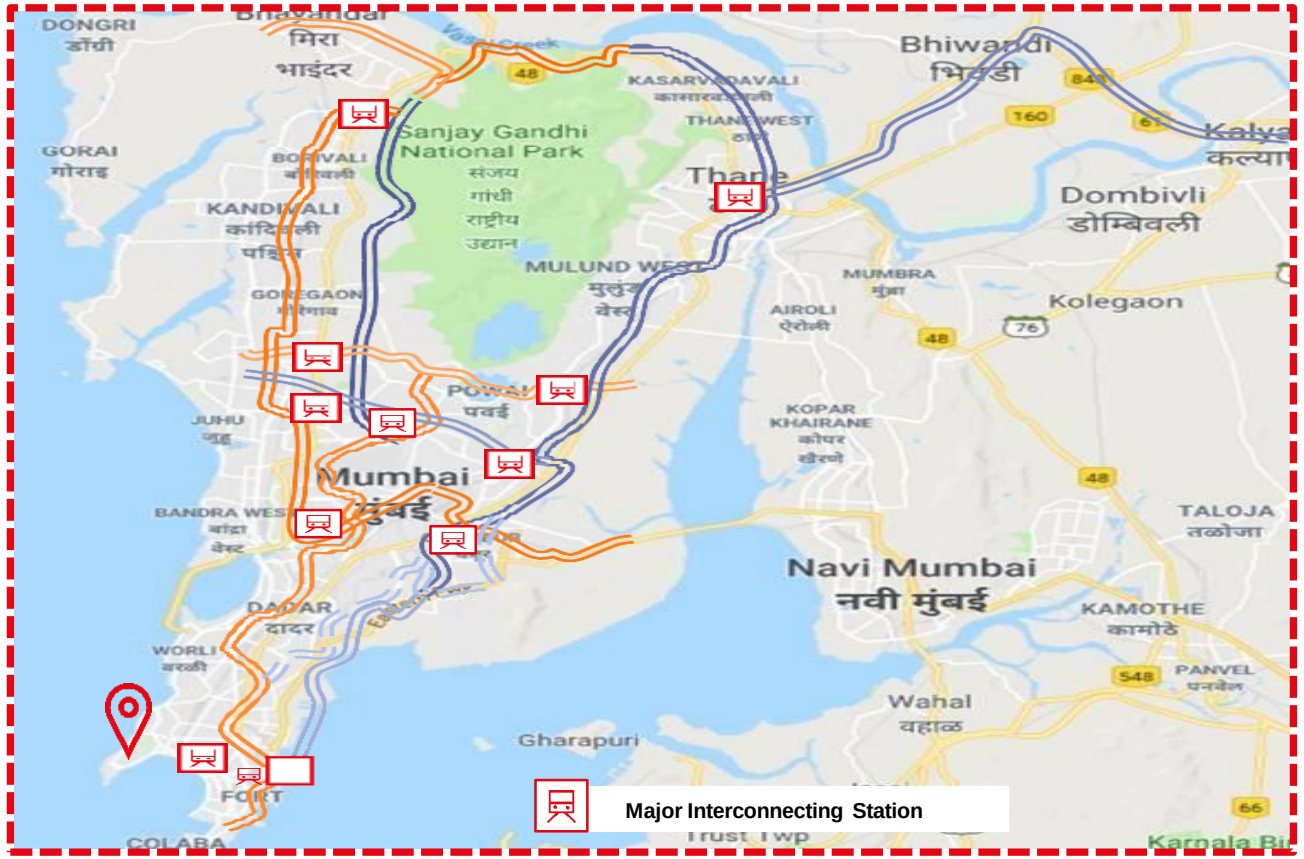
Year	Probability
2023	Medium

Metro 9: Dahisar to Miraroad

Year	Probability
2023	Medium

Metro 6: Lokhandwala to Kanjurmarg

Year	Probability
2023	Medium



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Subject Property

Year	Probability
Current estimated year of completion	Anticipated probability of completion within next 3 to 5 years (Low, Medium, High)

Metro 7: Dahisar to Andheri (WEH)

Year	Probability
2022	High

Metro 4: Thane to Wadala

Year	Probability
2023	Medium

Metro 5: Thane to Kalyan

Year	Probability
2024	Low

Metro 10: Gaimukh to Shivaji Chowk

Year	Probability
2024	Low

Metro 11: Wadala to CST

Year	Probability
2025	Low

Monorail : Wadala to Jacob Circle

Year	Probability
2020	Operational

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Mumbai Infrastructure Update – Road Network

The upcoming coastal road along the western coastline of Mumbai, Nhava Sheva Sea Link, along with various other road initiatives to improve east-west connectivity within the city will significantly reduce travel time and improve connectivity to all parts of the City from the Subject Property.

Operational

Mumbai Pune Highway
Beneficiary Areas: Navi Mumbai

Eastern Freeway
Beneficiary areas: South Mumbai and Chembur

Bandra Worli Sealink
Beneficiary areas: BKC, Sion

Existing Highways
Beneficiary areas: Eastern suburbs, Western suburbs

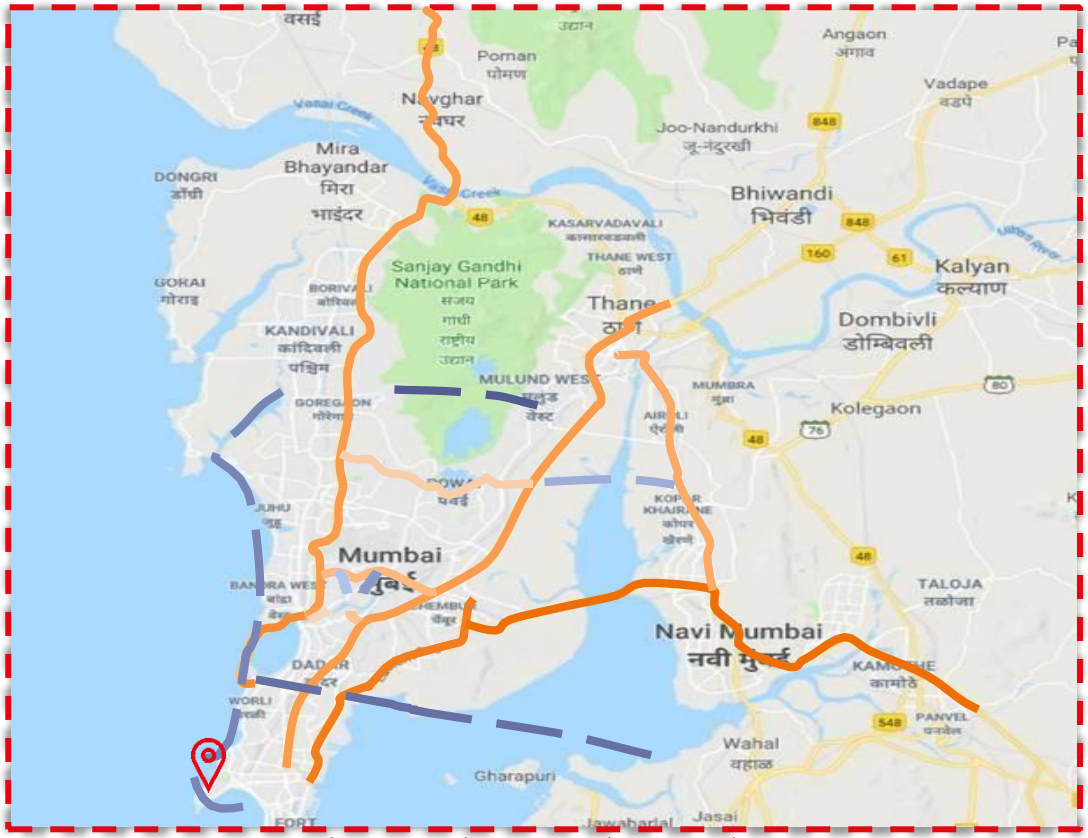
Thane Belapur Road
Beneficiary areas: Airoli, Ghansoli and Turbhe

SCLR
Beneficiary areas: Kalina, Chembur

Chunabhatti – BKC Bridge
Beneficiary areas: BKC, Eastern Suburbs

JVLR
Beneficiary areas: Jogeshwari, Powai, Kanjurmarg

Sea Link to BKC Bridge
Beneficiary areas: BKC



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Year	Probability
Current estimated year of completion	Anticipated probability of completion within next 3 to 5 years (Low, Medium, High)

Subject Property

Upcoming

Goregaon – Mulund Underpass

Year	Probability
2023	Medium

Nhava Sheva Sea link*

Year	Probability
2025	Low

Coastal Road

Year	Probability
2024	Low

SCLR – BKC Bridge

Year	Probability
2022	Medium

Kanjurmarg – Ghansoli Bridge

Year	Probability
2022	Medium

Kalina – BKC Bridge

Year	Probability
2022	High

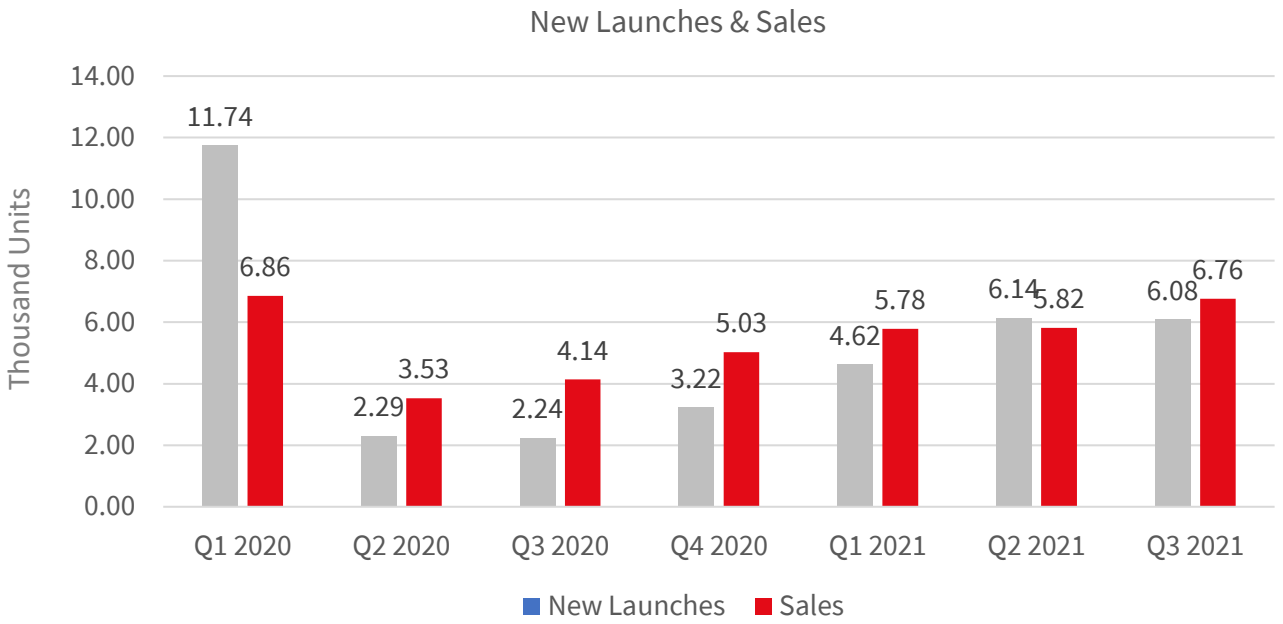
*Including Worli Sewri Connector

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Mumbai Residential Market Overview

Key Trends

- New launches remained almost stable at 6,084 units in Q3 2021 as compared to 6,143 units in Q2 2021. Around 32% of the new launches were concentrated in the ticket size of INR 1 cr. to 2 cr.
- Overall sales increased by 16% q-o-q in Q3 2021 of which 33% of the sales were concentrated in the INR 1 crore to INR 2 crore segment, followed by sales of around 30% between INR 50 Lac to INR 1 crore category
- Capital values inched up marginally in Q3 2021. Prices are expected to increase marginally over the next 12 months driven by the strong demand
- The return to normalcy due to increased vaccination, economic growth and positive outlook is expected to be reflected in higher home sales in the coming quarters



	Q1 2020	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021
Unsold Inventory (Units)	123,869	122,636	120,743	118,940	117,777	118,099	117,427

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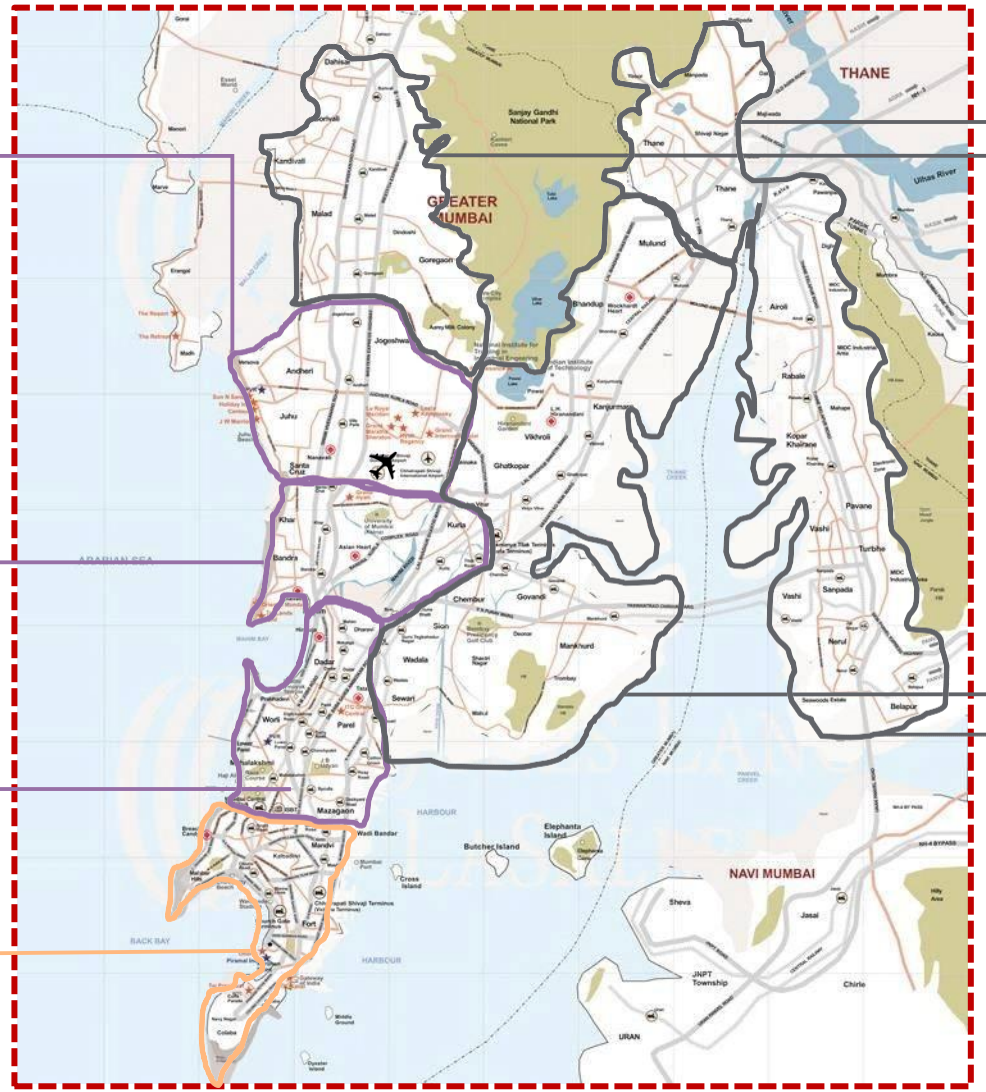
Mumbai Residential Market Snapshot

Western Suburbs 2
Capital Values:
INR 13,000 - 22,000

Western Suburbs 1
Capital Values:
INR 19,000 - 30,000

South Central Mumbai
Capital Values:
INR 25,000 - 35,000

South Mumbai
Capital Values:
INR 35,000 - 60,000



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Subject Property Micro Market

Extended Suburbs
Capital Values:
INR 8,000 - 11,000

Thane
Capital Values:
INR 8,000 - 15,000

Eastern Suburbs
Capital Values:
INR 12,000 - 21,000

Navi Mumbai
Capital Values:
INR 7,500 - 15,000

Capital Values on Super Built Up / Saleable Area

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Mumbai Residential Outlook



Sentiment improvement to hold steadfast in the coming quarters

Renewed buyer confidence has been instrumental in supporting the housing market recovery in Q3 2021, which recorded a healthy quantum of sales and launches as compared to the same period last year. In fact, these numbers are inching towards those in the pre-COVID era. The reduction in home loan rates which has taken interest rates to a decadal low, coupled with the festive season with its incentives & discounts and improved buyer confidence augur well for the residential sector. With the residential prices holding steady along with various incentives offered by developers, the residential market is likely to build on these gains.

New launches of independent floors and plotted developments expected to go up

Although Q3 2021 witnessed healthy launches, new launches continued to remain below the pre-covid quarter of Q1 2020 (around 40,500 units) and the average quarterly launches witnessed in 2019 (around 34,000 units). New launches are expected to go up in the next quarter as developers are looking to take advantage of the festive season. Moreover, the trend of launching plotted developments and independent floors is expected to gain traction with buyer preferences aligned towards such products while developers get the advantages of faster execution, quick delivery and inventory liquidation.



Consolidation to increase further in residential market

It is expected that market share of established and credible developers will increase further with buying preference skewed towards offerings from developers with proven track record, financial strength and execution capability. The sector is expected to witness consolidation at a faster clip with more joint ventures and development management contracts likely to be seen as marquee developers take over projects from those struggling with completion or sales momentum.

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Annexures: Area Statement and Pictures

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Annexure: Site Photographs



Entrance



Existing Structure

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Thank you

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