

As of January 1, 2026, the global real estate market has officially pivoted from a phase of "correction" to a phase of "Structural Quality." 2025 was a landmark year where institutional capital and end-user "selectivity" became the primary drivers of growth.

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## Real Estate Investment Global Briefing: 2025 Retrospective

### 1. Indian Metros: The Institutional "Bull Run"

India ended 2025 as the fastest-growing real estate market in Asia, characterized by a massive influx of foreign capital and a shift toward premium assets.

- **Institutional Capital:** Equity investments in Indian real estate surpassed **\$11.4 billion** in 2025. Mumbai and Delhi-NCR led the way, capturing 50% of this capital.
- **The "GCC" Anchor:** Global Capability Centers (GCCs) fueled record-breaking office leasing. The number of GCCs in India is projected to hit 2,100 by 2030, keeping Grade-A office demand robust.
- **Residential Premiumization:** Luxury housing (above ₹1 Crore) moved from a niche to a core market segment. Total residential sales in major cities surged by nearly **77%** compared to pre-pandemic levels.
- **Digital Infrastructure:** Data centers emerged as a top-three asset class for institutional investors, with over **\$11 billion** in new commitments in 2025 alone.

### 2. Dubai: The Era of "Permanence"

2025 was the most transformative year in Dubai's history, moving from a speculative market to a long-term global home.

- **Record Transactions:** The market recorded **213,700 residential transactions** worth **AED 681 billion**—a record-breaking year for the Emirate.
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- **Price Growth:** Average sale prices climbed **7.6%**, driven by lifestyle relocations rather than flipping.
- **Yield Superiority:** Rental yields in Dubai remained globally unmatched, ranging from **8% to 12%**, compared to 3-4% in London or New York.
- **First-Time Home Buyers:** A new government program launched in mid-2025 boosted momentum, with Emaar and Damac allocating 10% of units specifically for first-time buyers.

## 3. Singapore: The "Defensive Fortress"

Singapore solidified its status as the world's primary "Safe Haven," focusing on wealth preservation and supply-side management.

- **Price Resilience:** The Property Price Index rose by **5.08% YoY** in late 2025, with the **Core Central Region (CCR)** outperforming at **8.28% growth**.
- **Policy Impact:** Higher stamp duties (60% ABSD for foreigners) slowed speculative sales, but structural demand from HNWIs and talent-pass holders (ONE Pass) kept the premium rental market firm.
- **New Launches:** Over 3,200 new private units were sold in Q3 2025 alone—a 183% surge compared to 2024—fueled by a massive pipeline of high-quality project launches.

## 4. Thailand: The "Value & Tourism" Play

Thailand navigated a bifurcated 2025, with a struggling mass-market residential sector but a booming luxury-resort economy.

- **Phuket vs. Bangkok:** Phuket significantly outperformed Bangkok in 2025, with Average Daily Rates (ADR) in the hospitality sector holding steady and luxury villas seeing high demand from European and Russian investors.
- **Policy Stimulus:** The government reduced transfer and mortgage fees to **0.01%** for homes under 7 million THB to stimulate the middle market.
- **Industrial Corridor:** Demand for industrial real estate in the **Eastern Economic Corridor (EEC)** rose by nearly 50%, driven by global supply chain shifts.

## 5. Global Macro Trends & 2026 Strategy

- **The AI Multiplier:** Data centers and AI-infrastructure are now the highest-conviction sector plays globally.

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- **Sustainability Premium:** Green-certified assets (IGBC/GRIHA in India, ESG-compliant in Europe) now command a **10-15% rental premium**.
- **Sector Rotation:** Investors are moving away from Grade-B offices toward "**Living**" sectors (Senior Housing, Student Housing, and Built-to-Rent).
- **Yield Arbitrage:** With interest rates stabilizing globally, the "bid-ask" spread between buyers and sellers has finally narrowed, setting the stage for a high-volume transaction year in 2026.

Investor Sentiment Table (Year-End 2025)

Market	2025 Performance	Top Asset Class	2026 Strategy
India	Aggressive Growth	Office / Data Centers	Equity Deployment
Dubai	Record Highs	Luxury Villas / Off-plan	Yield Harvesting
Singapore	Defensive / Stable	CCR Resi / Industrial REITs	Wealth Preservation
Thailand	Mixed / Recovery	Resort Villas / EEC	Value Picking