

FRESH DATA

BUDAPEST OFFICE MARKET

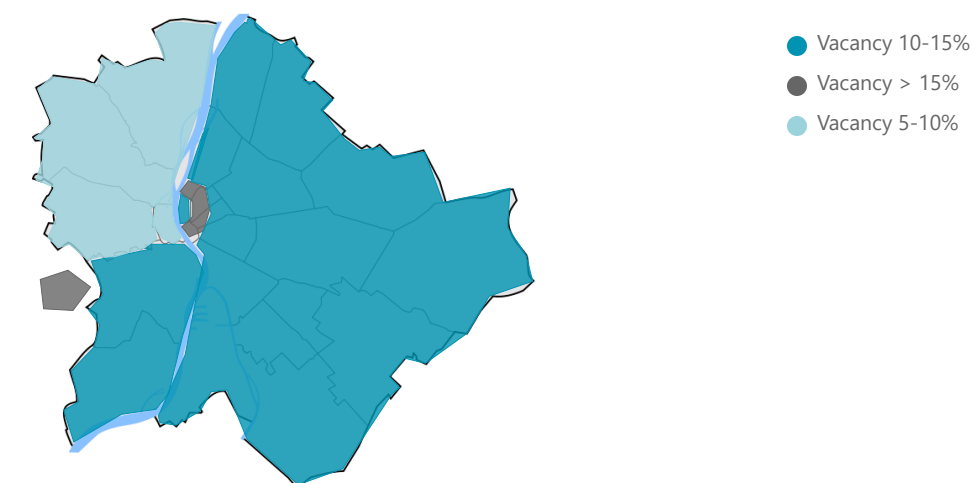
Q3 2023



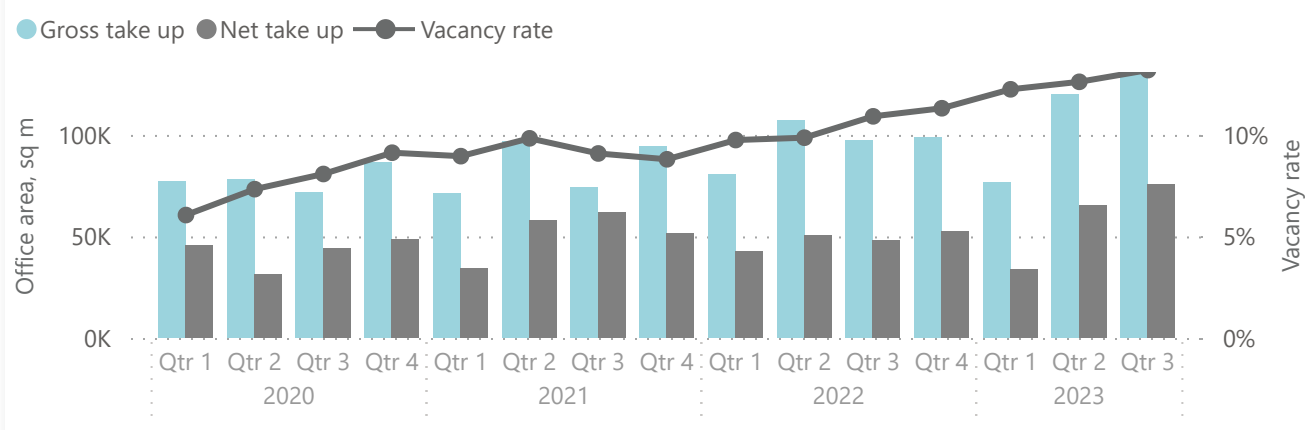
QUARTERLY INDICATORS

136,700 Gross take-up	13.2% Vacancy rate	77,500 YTD new supply	75,400 Net take-up	25.00 € Prime rent	5.75% Prime yield
14% Gross take-up - QoQ	0.6 Change QoQ %	-59% YoY change	15% Net take-up - QoQ	2% YoY change	75 bps YoY change

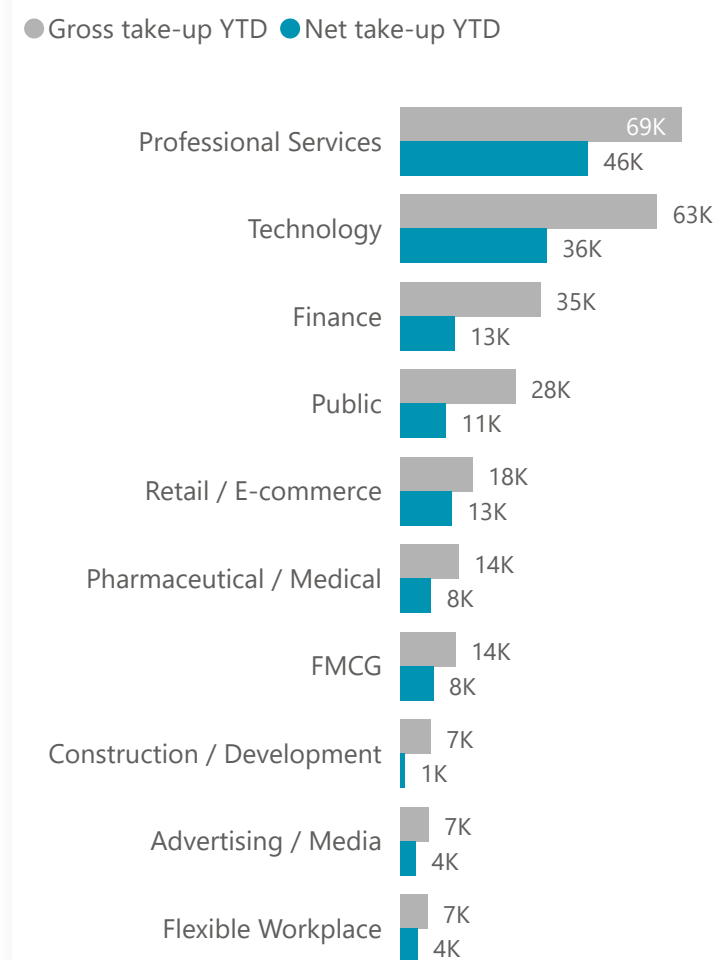
VACANCY RATE



QUARTERLY TAKE-UP



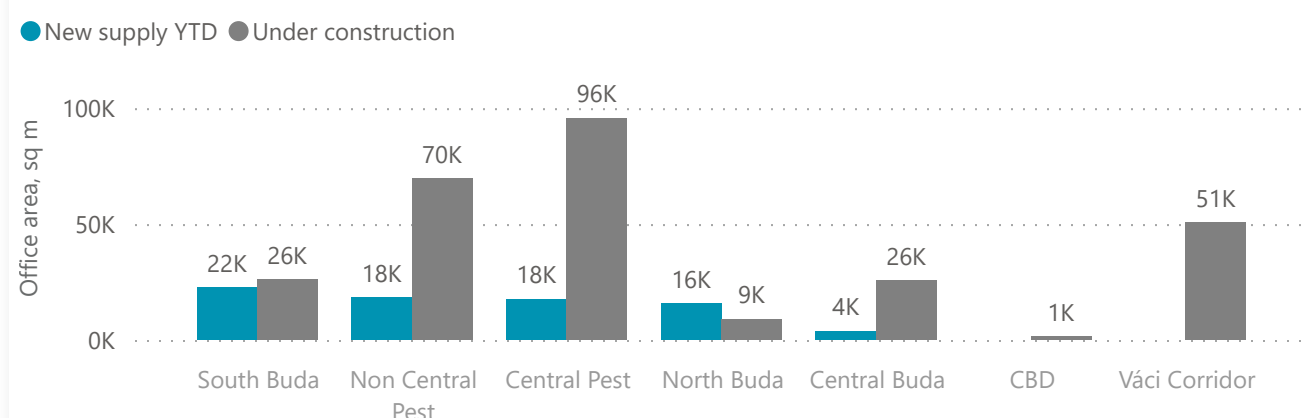
YTD TAKE-UP (SQ M) BY SECTORS



COMPLETIONS IN THE LAST 12 MONTHS

Building	Submarket	Completion	Total size	Developer
H2O Offices P1	Váci Corridor	2022 Q4	25,900	Skanska
BIF Tower	Non Central Pest	2023 Q1	8,500	BIF
BudaPart Downtown	South Buda	2023 Q2	8,400	Property Market Zrt
F99	South Buda	2023 Q2	14,000	Proform
RoseVille	North Buda	2023 Q2	15,500	Atenor
Homework	Central Buda	2023 Q3	3,700	Codic
Liberty - South Wing	Non Central Pest	2023 Q3	9,700	WING

YTD NEW SUPPLY BY SUBMARKETS



NEW SUPPLY PLANNED FOR THE NEXT 12 MONTHS

Building	Submarket	Completion	Total size	Developer
BEM Center	Central Buda	2023 Q4	22,100	Property Market Zrt
Corvin Palace	Central Pest	2024 Q1	9,100	Corvin Áruház Kft
Arena Business Campus B	Non Central Pest	2024 Q1	15,400	Atenor
Madarász IV	Váci Corridor	2024 Q1	11,100	Proform
Millennium Gardens P2	Central Pest	2024 Q2	16,500	Trigránit&Revetas
Liberty - North Wing	Non Central Pest	2024 Q2	19,800	WING
Bakerstreet P1	South Buda	2024 Q2	16,600	Atenor