Chandana Homes

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MARKET INTELLIGENCE
ISSUE NO. 01
JULY 2026

WEST HYDERABAD MARKET INTELLIGENCE

MONTHLY RESIDENTIAL BULLETIN

The Tellapur–Kollur *Corridor Report*

A monthly, plainly-written read on prices, supply, demand and the infrastructure moving the west of the city — for the family buying a home, not just the market watching the numbers.

INSIDE
Price Tracker

INSIDE
Infrastructure Watch

INSIDE
Best Buying Opportunities

Prepared by **Chandana Homes Pvt. Ltd.**
Hyderabad

Data as of July 2026
Sources on the final page

READ THIS FIRST

The month, in a single glance.

Buyer confidence	▲ Rising
Price momentum	▲ +7% YoY
New-launch activity (corridor)	▲▲ High
Rental demand	▲ Strong
Affordability	● Stable
Risk level	● Low–Medium

CHANDANA CORRIDOR INDEX

8.3/10

Our editorial read of
the Tellapur–Kollur belt

This month's conclusion

West Hyderabad remains one of India's healthiest residential markets — sales grew in H1 2026 even as most big cities slipped, and prices firmed steadily rather than spiking. The strongest value continues to lie in the **Tellapur–Kollur growth corridor**: the same connectivity as the pricey job core, at a materially lower entry, with the city's busiest launch pipeline and its best rental yields.

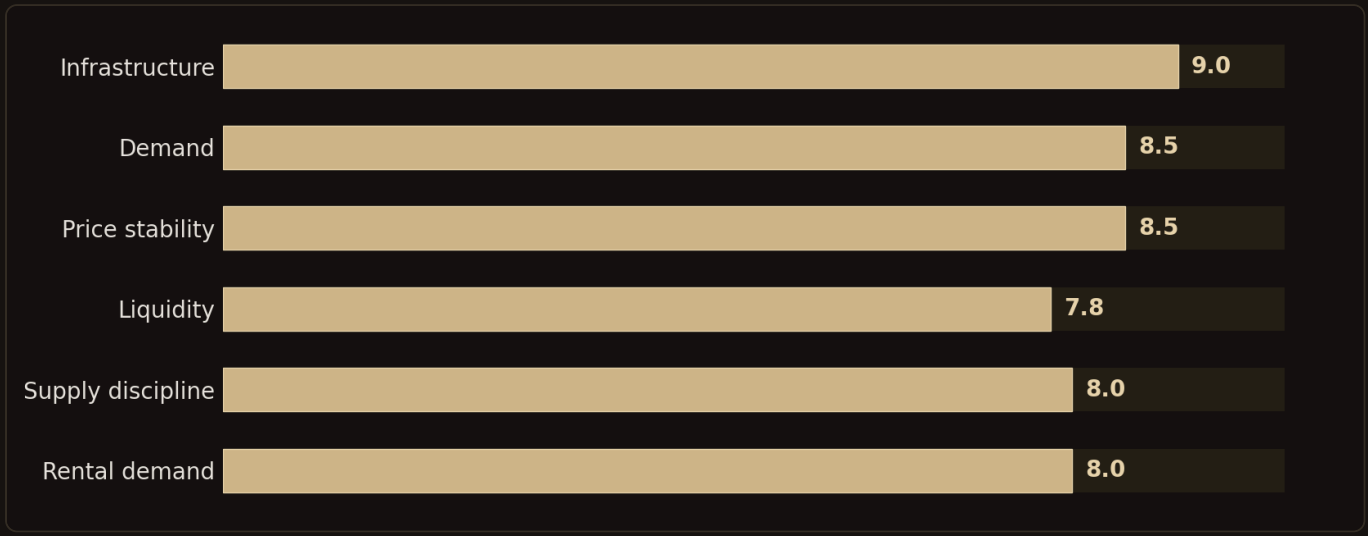
The indicators and Index above are **Chandana Homes' editorial assessment**, built from the sourced market data in this report — a house view to orient a buyer quickly, not an official market rating. Every hard number is sourced on the final page.

EDITORIAL INDEX · CHANDANA HOMES HOUSE VIEW

CORRIDOR INDEX

Six forces, one read.

We score the corridor on the six forces that decide whether a home holds and grows its value. These are our own weightings of the sourced data — an orientation tool, not an official statistic.



Chandana Corridor Index — editorial scores (out of 10), derived from the sourced data in this report.

FORCE	SCORE	WHY
Infrastructure	9.0	Metro Phase 2 cleared its last legal hurdle; RRR under construction; Neopolis next door — though these are multi-year builds
Demand	8.5	Sales grew (+1% YoY) while most cities fell; record office leasing (+29%) is future housing demand
Price stability	8.5	Steady +7% YoY appreciation — firm, not frothy
Supply discipline	8.0	Launches eased 2%; healthy 5.9 quarters of inventory, not oversupplied
Rental demand	8.0	Strong IT-tenant pull; western belt yields 3.8–4.5%, best in the zone
Liquidity	7.8	₹1–2 Cr homes clear fastest; larger tickets take longer to resell

OVERALL CORRIDOR INDEX

8.3/10

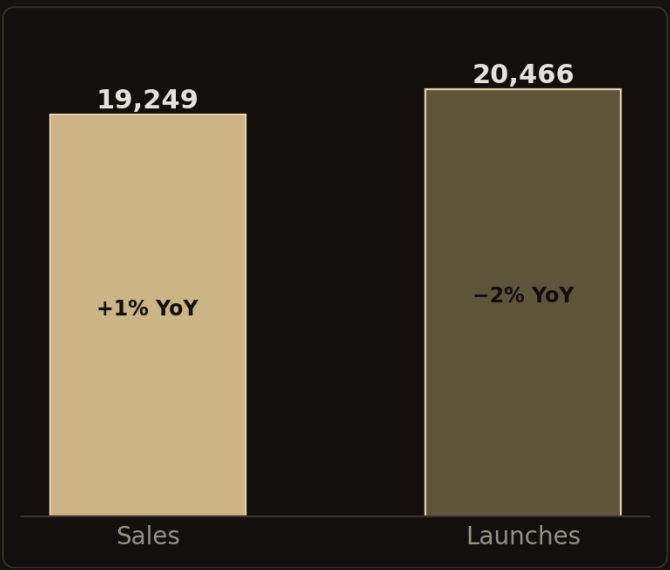
A healthy, growth-tilted market — reward for patient, quality-first buyers

THE HARD DATA

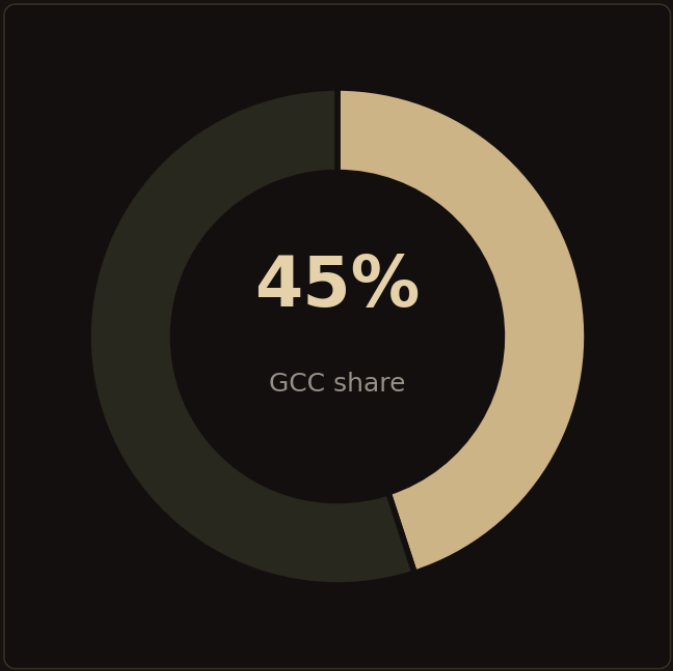
Hyderabad held its ground while the big cities slipped.

Knight Frank's report, released this July, confirmed the half-year's headline: Hyderabad was one of the few large Indian markets to grow home sales in H1 2026, even as prices kept climbing — and the engine behind it, record office leasing, sits right beside our corridor.

19,249	₹8,258	5.9 q	7.5M
HOMES SOLD · H1 2026	AVG PRICE / SQ FT	QUARTERS-TO-SELL	OFFICE LEASING SQ FT
+1% YoY	+7% YoY	Healthy	+29% · record



Sales held up as launches eased — disciplined and balanced. (Knight Frank H1 2026)



GCCs took 45% of a record 7.5M sq ft office leasing — the job engine behind housing.

- **Sales rose while others fell** — 19,249 homes (+1% YoY) as most top-eight cities declined.
- **Prices firming, not spiking** — city average ₹8,258/sq ft (+7% YoY); Q1 alone was +9%.
- **Supply disciplined** — launches eased 2% to 20,466 units; inventory a comfortable 5.9 quarters.
- **The ₹1–2 crore home is the sweet spot** — fastest-absorbing large segment, the corridor's core.

WHAT THE EXPERTS ARE SAYING

Six firms. One direction.

Rather than rely on a single house's view, we cross-check the major international property consultants each month — Knight Frank, JLL, Anarock, Cushman & Wakefield and CBRE. They count differently, so their headline numbers rarely match; but when firms measuring independently all point the same way, you can trust the *direction*.

SIGNAL	WHAT THE CONSULTANTS REPORT	THE READ
Prices	Knight Frank +7% YoY (H1, ₹8,258/sq ft) · JLL +8% YoY (Q1)	▲ Firm ~7–8%
Home sales	Knight Frank 19,249 (H1, +1%) · Anarock 11,270 (Q2, +2% YoY, −9% QoQ)	▲ Growing
New launches	Knight Frank −2% YoY (H1) · Cushman & Wakefield 9,040 (Q2, −13% YoY)	▬ Easing
Office demand	Knight Frank Hyderabad 7.5 M sq ft (+29%, record) · CBRE India Q2 record 24.6 M · C&W India H1 ~43 M	▲▲ Record
GCC share	Knight Frank 45% (Hyderabad) · CBRE 42% (India, Q2)	▲ Anchoring
Capital / investment	CBRE India inflows $5.1 bn (Q1, +72% YoY — record quarter)	▲ Strong

Where they agree

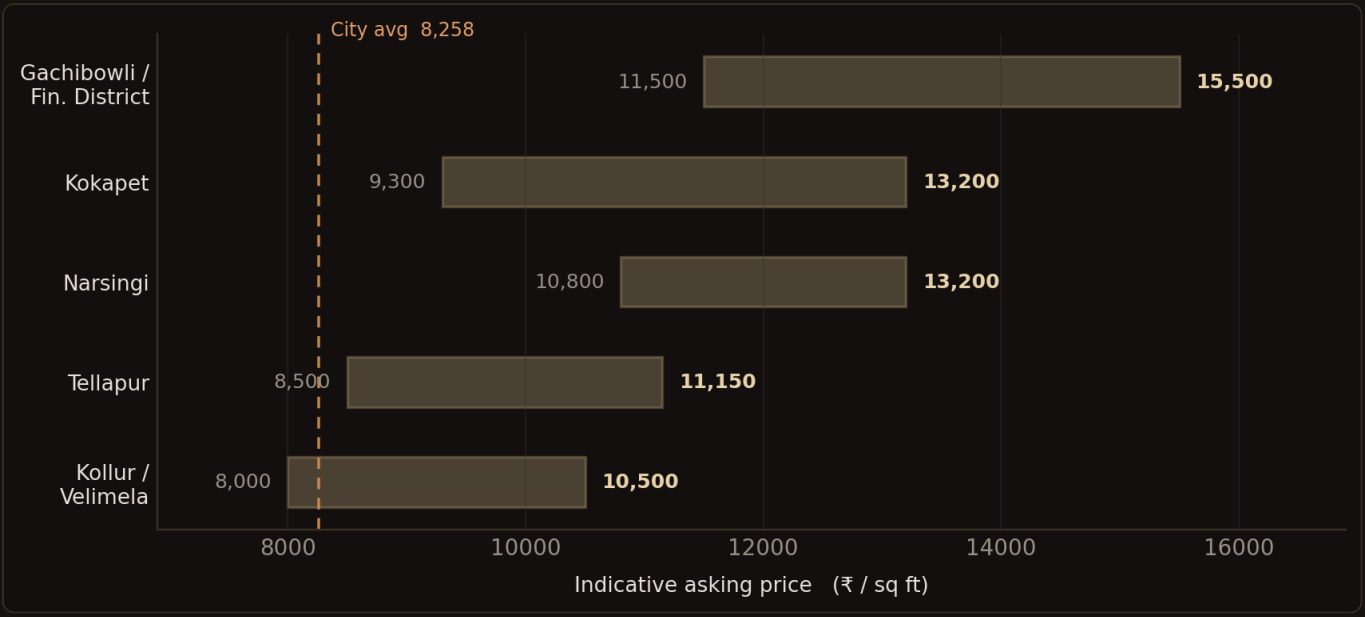
Prices firming (~7–8%), sales growing modestly, launches easing into discipline, and a record office market led by Global Capability Centres — a demand-rich, supply-balanced setup that favours the buyer holding for the medium term. It is a rare month when five independent firms tell the same story.

A note on the numbers. Absolute figures differ across firms because each defines the market differently — half-year vs quarter, primary sales vs all transactions, city boundaries and sample coverage all vary. That is normal and expected; we track the **consensus direction**, not any single headline count, and cite every figure to its source on the final page.

CROSS-SOURCE SYNTHESIS · FIGURES ATTRIBUTED, NOT REPRODUCED

THE PRICE MAP

West of the city, in five price bands.



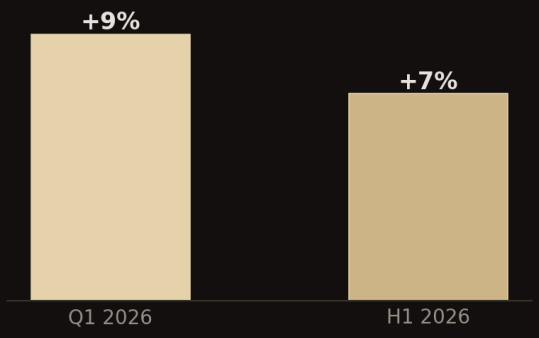
Indicative asking-price ranges from residential listing portals, 2026. Dashed line = city average (₹8,258/sq ft, Knight Frank). Transacted prices vary by project, tower, floor and view.

OUR VALUE READ

EDITORIAL · OPINION, NOT A RATING OF THE AREAS

- **Financial District** — EXPENSIVE · THIN VALUE
- **Kokapet · Neopolis** — EXPENSIVE · PREMIUM ANCHOR
- **Narsingi** — WATCH · PRICED UP
- **Tellapur** — GOOD BUY · FAIR ENTRY, YIELD
- **Kollur** — GOOD BUY · LOWEST ENTRY, RUNWAY
- **Velimela** — GOOD BUY · EARLY STAGE

Price growth (YoY)



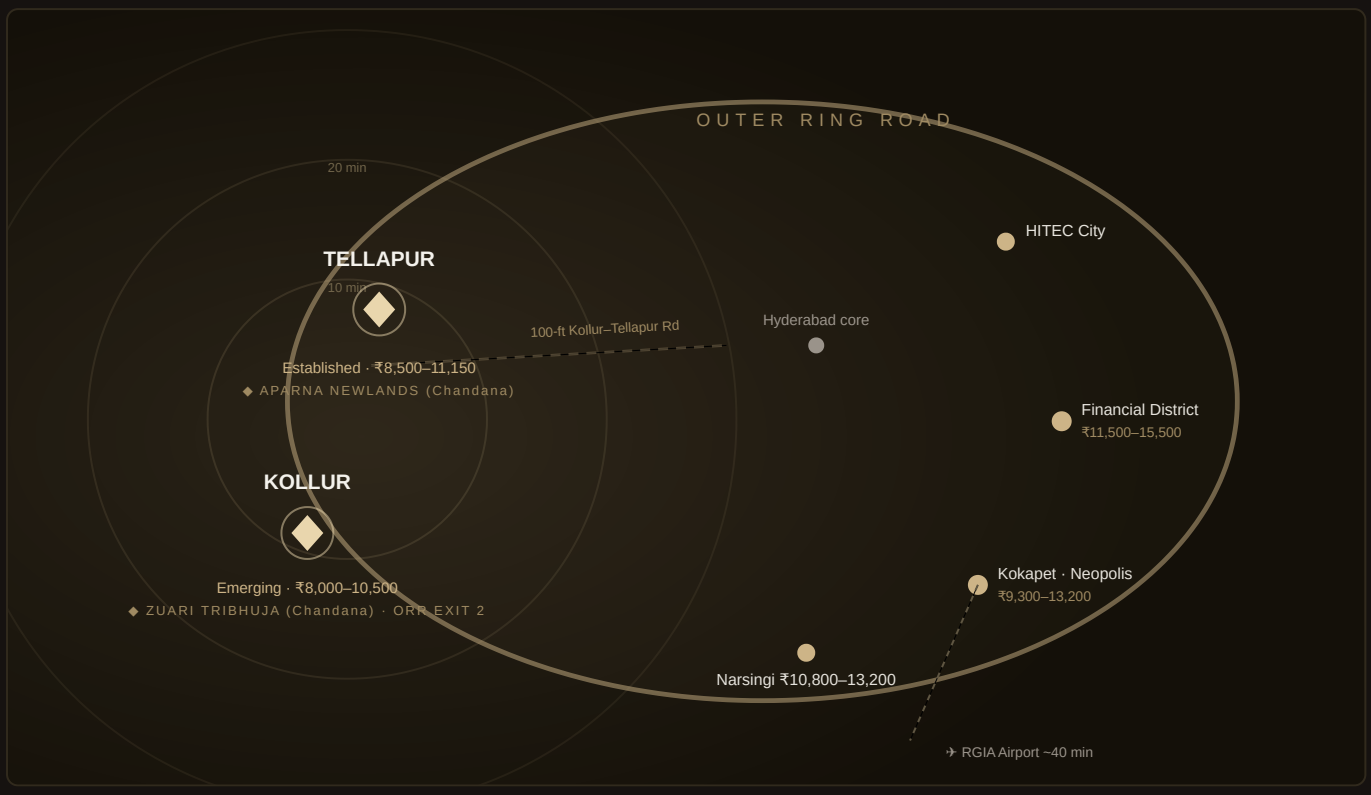
MICRO-MARKET	₹/SQ FT	YIELD*
Gachibowli / Fin. District	11,500–15,500	~3%
Kokapet (Neopolis)	9,300–13,200	2.5–3.4%
Narsingi	10,800–13,200	~3%
Tellapur	8,500–11,150	3.8–4.5%
Kollur / Velimela	8,000–10,500	3.5–4.5%

Sourced YoY price growth (Knight Frank).

*Indicative gross yields from listing-portal rent & price data. 2 BHK ≈ ₹30–45k/month, 3 BHK ≈ ₹50–80k/month in well-run gated communities — the yield edge sits west.

ORIENTATION

One ring road, two Chandana corridors.



Schematic, not to scale. Travel-time rings are indicative off-peak drive times from the corridor. Node prices are indicative asking ranges (listing portals, 2026). Chandana's two allocations — Aparna Newlands (Tellapur) and Zuari Gangothri Tribhuja (Kollur) — sit where western demand is densest.

2 min ORR EXIT 2	~25 min FINANCIAL DISTRICT	~30 min GACHIBOWLI / HITEC
~15 min KOKAPET / NEOPOLIS	~25 min ISB	~40 min AIRPORT (RGIA)

Approximate off-peak drive times from the Tellapur–Kollur belt, per project connectivity sheets; actual times vary with traffic and exact location.

THE NEIGHBOURHOOD

You don't just buy a home — you buy what's around it.

SCHOOLS

Samashti · Gaudium · Meru · Glendale · Birla Open Minds · Sancta Maria — all within a short drive.

HOSPITALS

Citizens Specialty · Continental · AIG · Care (Gachibowli) · KIMS (Kondapur) — multi-speciality care nearby.

WORK & IT

Financial District · Gachibowli · HITEC City · Mindspace · ISB — the western job engine on the doorstep.

RETAIL & MALLS

Sarath City Capital (India's largest) · Inorbit · Gachibowli Central — big-format retail 25–35 min out.

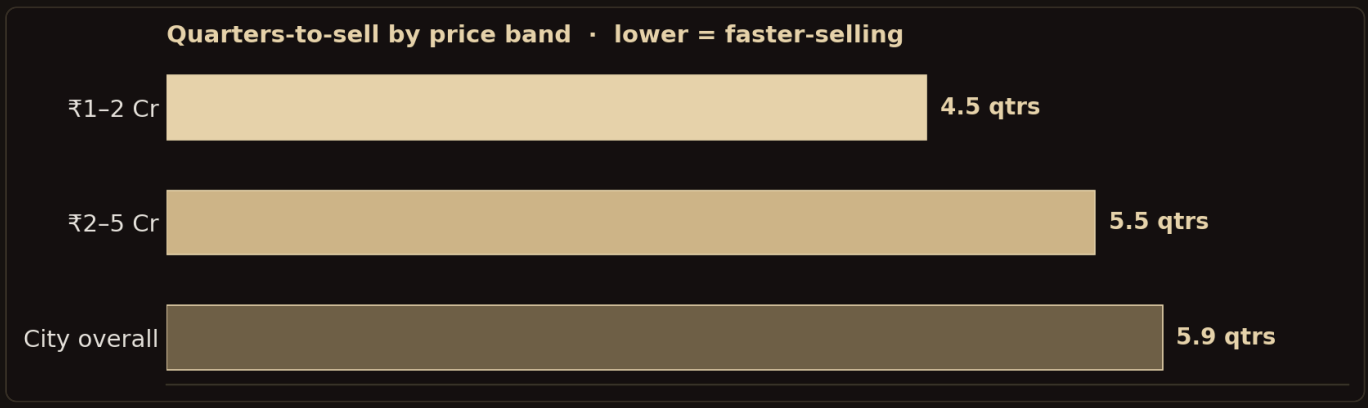
GREEN & RECREATION

Osman Sagar & Gandipet lakes · a solar-covered 23 km cycling track from Kollur toward Narsingi.

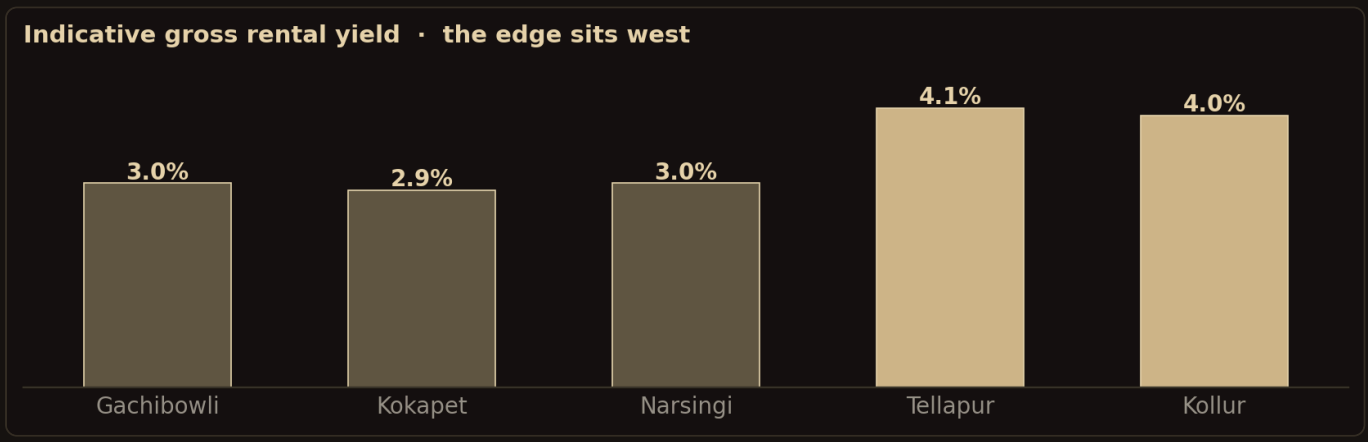
TRANSIT (TODAY)

ORR Exit 2 at Kollur · Nagulapalli MMTS · nearest Metro at Raidurg/Miyapur (Phase 2 extension planned).

DEMAND & ABSORPTION



How fast homes sell, by price band (Knight Frank H1 2026). The ₹1–2 Cr bracket clears fastest.



Indicative gross rental yields (listing-portal data). Lower entry prices give Tellapur & Kollur the yield edge.

OUR TWO MARKETS, SIDE BY SIDE

One is established. One is emerging.

COLLECTION ONE · TELLAPUR

The established choice

A well-connected premium belt of large gated townships — wide roads, international schools, ORR access in minutes, the Financial District ~7 km away. Maturity means lower risk, steadier appreciation.

- Asking ~₹8,500–11,150/sq ft
- Rental yield 3.8–4.5% · strong IT-tenant demand
- Nallagandla–Tellapur flyover & link roads easing commutes
- Demand proof: one Tellapur launch sold 1,700 flats in two weeks this year

COLLECTION TWO · KOLLUR

The growth choice

Right at ORR Exit 2, the primary spillover for the high-paying Kokapet–Neopolis belt. The city's most active launch pocket, 40–50-storey towers rising — which is why entry prices sit below Tellapur's.

- Asking ~₹8,000–10,500/sq ft · lower entry
- 2 minutes to ORR Exit 2 · airport ~40 min
- Longer appreciation runway as the belt densifies
- The earlier-stage, higher-upside end of the corridor

BUYING-DECISION MATRIX — EDITORIAL · CHANDANA HOUSE VIEW

First home	★★★★★	Rental income	★★★★☆
Long-term capital growth	★★★★☆	Investment (5-yr hold)	★★★★☆
Luxury living (Tellapur)	★★★★☆	Short-term flip	★★☆☆☆

How to read the two

Short horizon and you value a neighbourhood that already works? Tellapur. Comfortable buying into momentum for a larger 3–4 BHK at a lower per-foot price? Kollur rewards the wait. In both, buy quality — RERA-registered, well-built, well-located — and hold through the infrastructure cycle rather than chasing the cheapest number.

ON THE GROUND

Where we hold land-owner allocation.

Each issue we profile the communities Chandana Homes offers directly — the same RERA-registered homes, at transparent pricing, without brokerage.

TELLAPUR

Aparna Newlands

An Aparna Constructions gated community across 14.7 acres.

- 8 towers · 42 floors · 1,976 homes
- 2.5 & 3 BHK · 1,475–1,991 sq ft
- ~72,865 sq ft clubhouse · 60+ amenities
- RERA P01100007480 · possession ~2027
- Chandana inventory in Towers E–H

KOLLUR · ORR EXIT 2

Zuari Gangothri Tribhuja

By Zuari Infraworld (Adventz) & Gangothri Developers, across 9.14 acres.

- 9 towers · 37 storeys · 10.6 ft ceilings
- 3 & 4 BHK · 1,677–3,126 sq ft · 76% corner homes
- Club Tribhuja · amenities across 5 zones
- RERA P01100010650/51/52
- Solar-covered 23 km cycling track

Project details are from the developers' published RERA filings and brochures. "Price on Request" — figures are confirmed on enquiry. Chandana Homes sells only its own land-owner allocation, directly.

BUYER FAQS

Q. Should I buy now, or wait for prices to fall?

Nothing in the data points to a fall — sales grew and prices firmed ~7%. "Waiting" in a steadily rising, supply-disciplined market usually means paying more later. Buy when the home and the budget are right for you, not to time a dip.

Q. Is Kollur too early / too risky?

It's earlier-stage, not high-risk: it sits on the live ORR at Exit 2 and absorbs overflow from the priced-up Kokapet belt. The trade-off is a longer runway, not fragile fundamentals — buy RERA-registered and hold.

Q. Which side appreciates more — Tellapur or Kollur?

Tellapur offers steadier, lower-risk appreciation from a matured base; Kollur has more headroom precisely because it's cheaper today. Higher potential upside, slightly more patience required.

THE LONG GAME

Two megaprojects point straight at this belt.

Prices follow infrastructure. Below, each project's real stage — not a made-up percentage. A note of realism: these are multi-year builds, so treat them as long-term value, not this year's delivery.

Metro Phase 2

NOW: APPROVED

PLANNED · APPROVED · TENDERED · CONSTRUCTION · OPERATIONAL

122.9 km, eight corridors. DPR submitted, Centre's in-principle 50:50 nod secured, and in June 2026 the Supreme Court dismissed petitions against it. A Tellapur–Kollur extension is in the plan as a transit-oriented “15-minute city” vision — but the alignment is not yet built.

Regional Ring Road — Northern phase (158 km)

NOW: CONSTRUCTION

PLANNED · APPROVED · TENDERED · CONSTRUCTION · OPERATIONAL

Part of a 340 km access-controlled expressway with 21 interchanges. Northern phase targeted around 2026; it links the airport and job clusters without routing through the core.

RRR Southern phase (182 km)

NOW: EARLY WORKS

PLANNED · APPROVED · TENDERED · CONSTRUCTION · OPERATIONAL

Targeted for 2027–28; completes the ring and pushes structured growth further across the western districts.

Neopolis / Future City jobs pipeline

NOW: DEVELOPING

PLANNED · APPROVED · TENDERED · CONSTRUCTION · OPERATIONAL

Kokapet's Neopolis is rising as the city's “new downtown”; the southern Future City is in planning — under the state's ₹40,000 crore-plus push and Telangana Rising 2047. The ORR itself is already operational, and is the corridor's present-day backbone.

OUR 90-DAY OUTLOOK EDITORIAL · A VIEW, NOT A GUARANTEE

A steady market rewards patient buyers.

PRICES	DEMAND	INVENTORY	RENTAL
▲	▲	▬	▲

Our stance: accumulate quality, corridor-favoured

Expect the steady pattern to hold into the next quarter — firm prices, healthy demand, balanced inventory. This is a market to buy in for the right reasons — a home you'll use, or a hold you'll keep — rather than a quick flip. **Tellapur** suits the buyer who wants certainty now; **Kollur** suits the buyer who'll trade a little patience for a lower entry and a longer runway.

The monthly caution, repeated on purpose: verify RERA registration, confirm approvals and the developer's delivery record, and insist on a line-by-line cost sheet before any token. A good market is not a substitute for good diligence.

TAKE THE NEXT STEP

WEBSITE · WHATSAPP US · BOOK A VISIT · PAST REPORTS

Want this month's numbers for your budget?

Talk to our team, or book a site visit across Tellapur & Kollur.

chandanahomes.com

SOURCES

Knight Frank India — *India Real Estate: Residential & Office, H1 2026* (city sales, launches, average price, quarters-to-sell, office leasing). · Telangana Today, Outlook Money, Hindustan Times — reporting on the same. · Residential listing portals (99acres, RealtyPromoo, Westside Realty and others, 2026) — micro-market asking ranges, rents and yields. · Developer RERA filings & brochures (Aparna Newlands, Zuari Gangothri Tribhuja). · Public reporting on Hyderabad Metro Phase 2 and the Regional Ring Road (2025–26). Figures are the latest available as of July 2026.

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