TIME INDIA'S BEST EMPLOYERS 2025 statista

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INTELLIGENT INVESTMENT

India MARKET MONITOR

Q2 2026 - Investments

REPORT | CBRE RESEARCH

July 2026

CBRE

India
Market Monitor
Q2 2026

INVESTMENTS

Equity inflows into India's real estate market remained resilient during the April-June (Q2) period of 2026, supported by continued momentum in land / development site acquisitions and built-up office assets. The quarter also witnessed significant activity from domestic institutional investors, representing a substantial component of the total investment pie.

Market Performance in Q2 2026

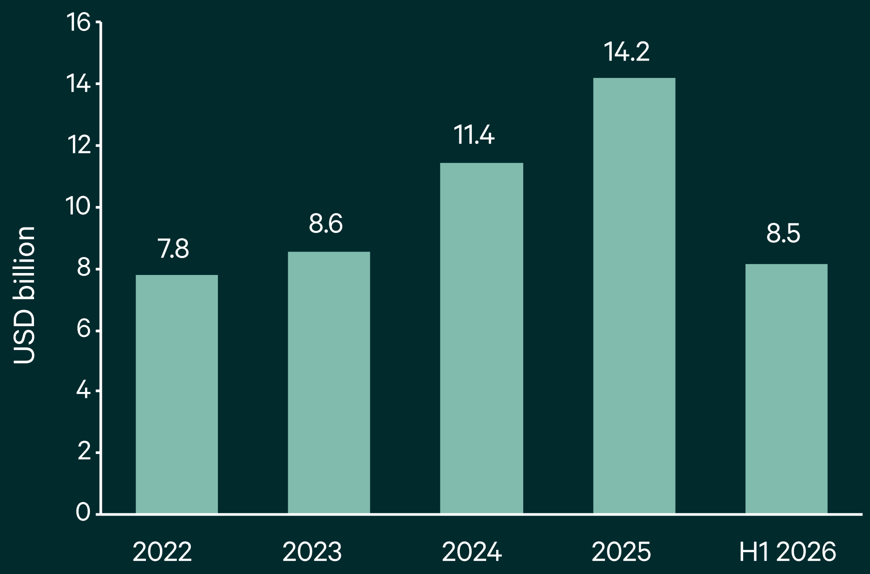
India Market Monitor

INVESTMENTS

USD 3.4 billion
Capital flows in Q2 2026, broadly stable compared with Q2 2025

USD 8.5 billion
Capital flows in H1 2026, up ~32% Y-o-Y

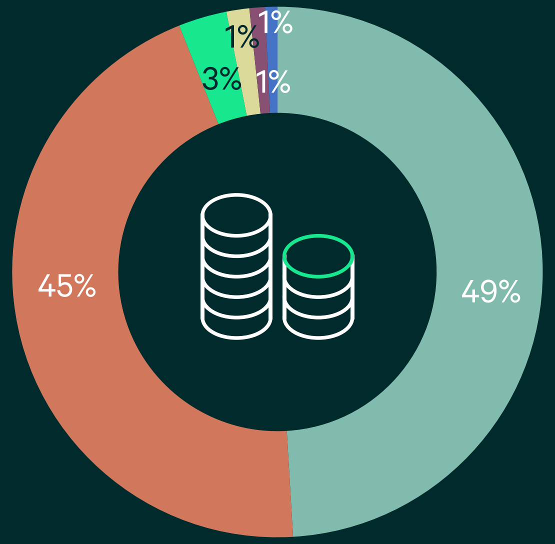
Equity investments in Indian real estate over the years



Source: CBRE Research, Q2 2026

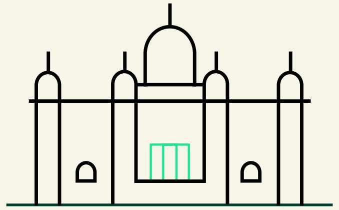
Land / development sites and built-up office assets collectively attracted ~94% of the overall equity investment inflows in Q2 2026.

Asset-wise share of equity investments in Q2 2026



Site/Land Office Residential
Retail Mixed-use Others*

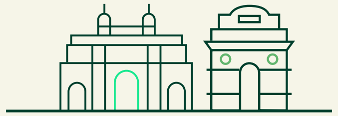
Source: CBRE Research, Q2 2026
*Others: Hotels and Industrial and Logistics (I&L)



Bengaluru, followed by Delhi-NCR and Mumbai, accounted for a cumulative

~60%

share of investment inflows during the quarter.



Developers led the total capital infusion, constituting a

~34%

share, closely followed by institutional investors at **~32%.**

~92%

Share of domestic investors (led by developers and institutional investors) in overall capital inflows during Q2 2026. Global investors accounted for the remainder, with capital from Russia (comprising a large-scale deal for commercial space) and the U.S. representing ~74% and ~16% of these inflows, respectively.

>88%

of total capital flows in site / land acquisitions were deployed for residential and office developments. The rest was committed to data centres, mixed-use, and I&L projects.

Investment and development platforms worth

~USD **1.6** billion

were set up in the residential and office sectors, in addition to the capital infusion of **USD 3.4 billion** during the quarter.

Note: The data presented in this report was compiled at the time of report generation and may be revised in subsequent quarters as more information becomes available. Therefore, the data should be considered provisional and subject to ongoing refinement.

Outlook

INVESTMENTS

India's real estate sector is poised for sustained investment momentum through 2026, supported by steady capital inflows into both built-up asset acquisitions and new project development. Demand for built-up assets continues to be underpinned by consistent momentum in REIT-led investments and sustained participation from institutional investors, while development activity remains supported by steady land / development site acquisitions.

While domestic inflows dominated the overall investment activity in H1 2026, foreign capital is expected to re-engage in the second half of the year. In the near term, however, select buyers and sellers may adopt a more calibrated approach amid an uncertain geopolitical environment and evolving interest rate expectations. At the same time, greenfield activity is expected to remain resilient, with notable traction across residential, office, mixed-use, warehousing, and data centre (DC) developments.

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