



INDIA

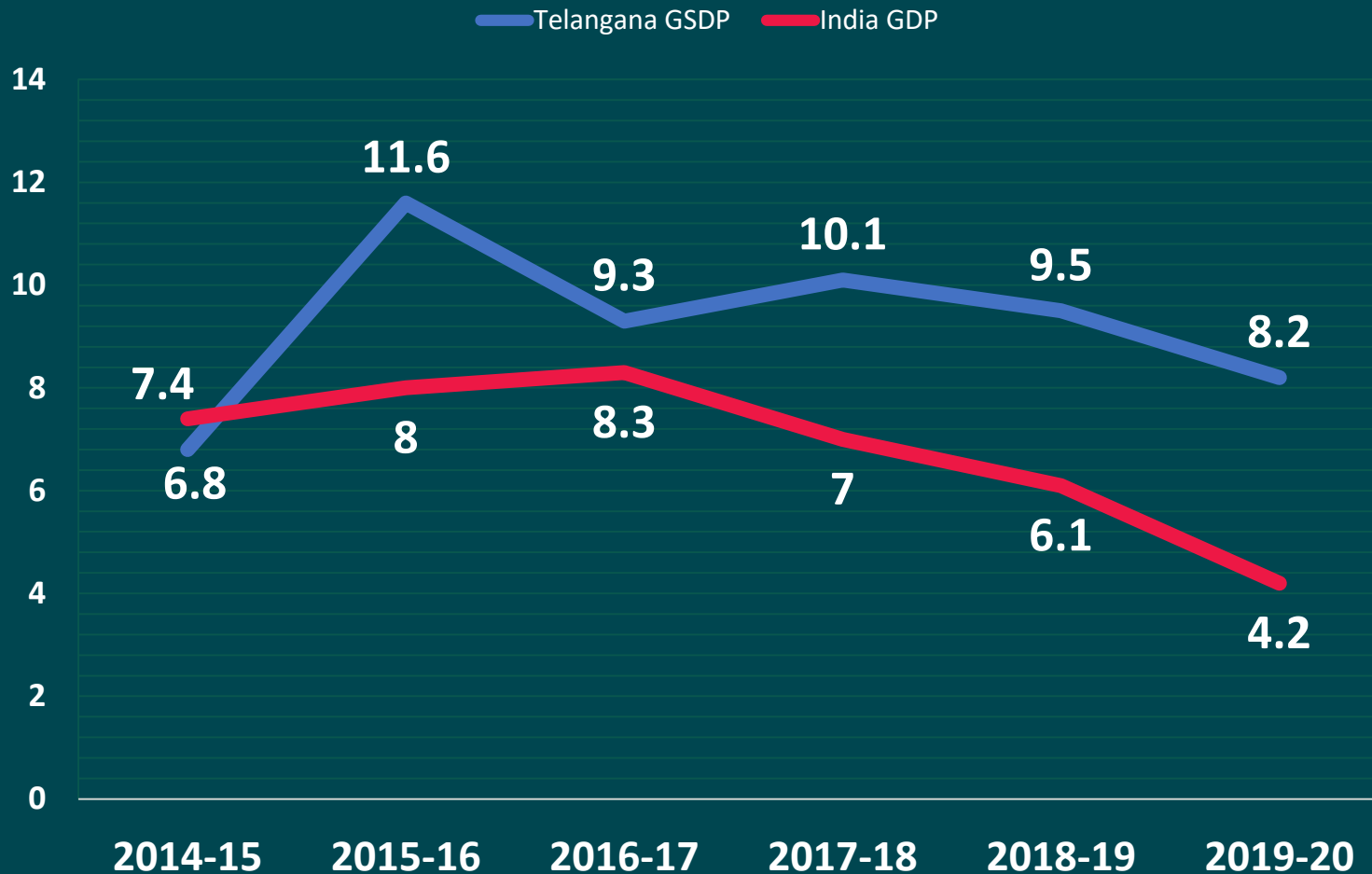
WFH

#Work from Hyderabad

TELANGANA



Real GDP Growth Rate (in %)



State Real GDP CAGR (9.8%) higher than India Real GDP CAGR (6.9%) during 2014-15 to 2019-20

State per-capita income (INR 0.2 mn in 2019) higher than national average (INR 0.1 mn in 2019)



Global giants with major presence in Hyderabad

WHY
#WFHyderabad

Key enablers of #WFH Hyderabad



Conducive policies



Infrastructure impetus



Affordable real estate costs



High consumption market



Abundant talent pool



First rank on Mercer's
Quality of Living Index
(2015-2019)

Conducive government policies



Telangana State Industrial
Project Approval and
Self-Certification System
(TS-iPASS)



Telangana State Industrial
Infrastructure Corporation
(TSIIC) has developed 153
industrial parks



Rank 3 on Ease of Doing
Business (EODB) 2019



56 notified Special
Economic Zones (SEZs) -
highest in the country



Red carpet roll-out for new sectors

PHARMACEUTICAL & LIFE SCIENCES

- Genome Valley 2.0
- Hyderabad Pharma City
- Medical Devices Park



AIRPORTS & AEROSPACE

- GMR Aerotropolis
- 4 Aerospace Parks



Industrial Clusters

ELECTRONICS

- E-City, Raviryal
- EMC, Maheswaram



MSME

- TIF-MSME Green Industrial Park



ELECTRIC VEHICLES

START-UP ECOSYSTEM

- T-Hub, We-Hub
- T-Works



INFRASTRUCTURE **IMPETUS**

Growth in Dispersion (GRID) policy - A catalyst for all round regional growth

- Fiscal incentives for multi-sector economic growth in all regions of Hyderabad.
 - Social infrastructure beyond the west zone of city.
- Next 5-year tailwind for IT sector: 100 acres of land allotment, 10 mn sq ft of office space, 100,000 jobs.

Transit-oriented infrastructure

Strategic Road Development Programme (SRDP)

Skyways, cable bridges, elevated corridors, roads, underpasses, grade separators and flyovers for overall improvement in the city connectivity and ease traffic

Elevated Bus Rapid Transport System (EBRTS)

Elevated system to take off burden of existing roads.
Relatively better travel cost and construction time dynamics compared to the popular metro rail project

Outer Ring Road (ORR)

158 km arterial road decongesting the city and cutting down travel time

Metro rail

World's largest metro rail project in PPP Mode.

Second largest metro rail network in India with 72 km. Future expansion planned.

Integration with other modes of transport like buses, taxis, auto-rickshaw, and bicycles ensures last mile connectivity.

Public utility infrastructure

Transformation into a power surplus state

Installed power generation capacity increased from 6,000 MW in 2014 to 16,000 MW at present

Initiatives to ensure sustained drinking water supply

Keshavapuram Reservoir- spread over 1,490 acres – to meet drinking water requirement of Hyderabad till 2050

REAL ESTATE

Robust office market



All India Office Transactions (mn sq m)

	Mumbai	NCR	Bengaluru	Hyderabad	Pune	Chennai	Kolkata	Ahmedabad	All India
2013	0.6	0.6	0.9	0.3	0.4	0.3	-	-	3.1
2014	0.7	0.7	1.0	0.4	0.4	0.4	-	-	3.6
2015	0.7	0.7	1.0	0.4	0.5	0.5	0.1	0.1	4.0
2016	0.7	0.7	1.1	0.6	0.4	0.5	0.1	0.1	3.9
2017	0.7	0.6	1.1	0.5	0.4	0.4	0.1	0.1	4.0
2018	0.7	0.7	1.2	0.7	0.6	0.3	0.1	0.1	4.4
2019	0.9	0.8	1.4	1.2	0.6	0.5	0.1	0.1	5.6

Hyderabad's rank in All India office transactions jumped from 6 in 2015 to 2 in 2019

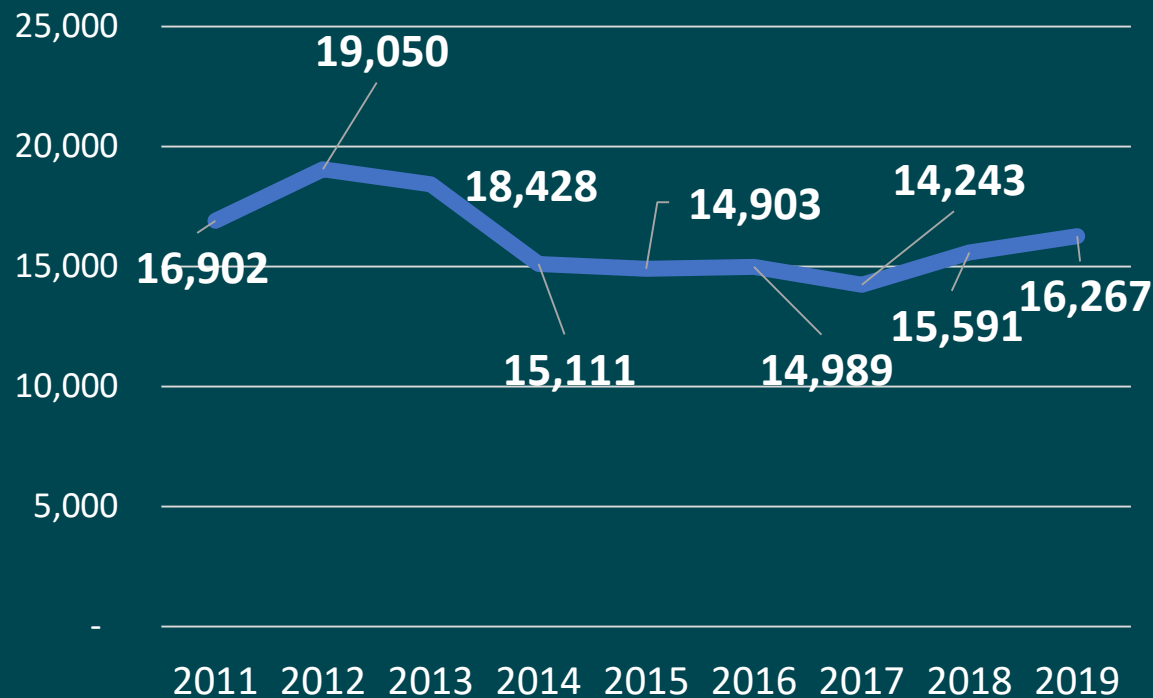
Record high transaction volume of 12.8 mn sq ft in 2019

Rentals remain steady despite COVID

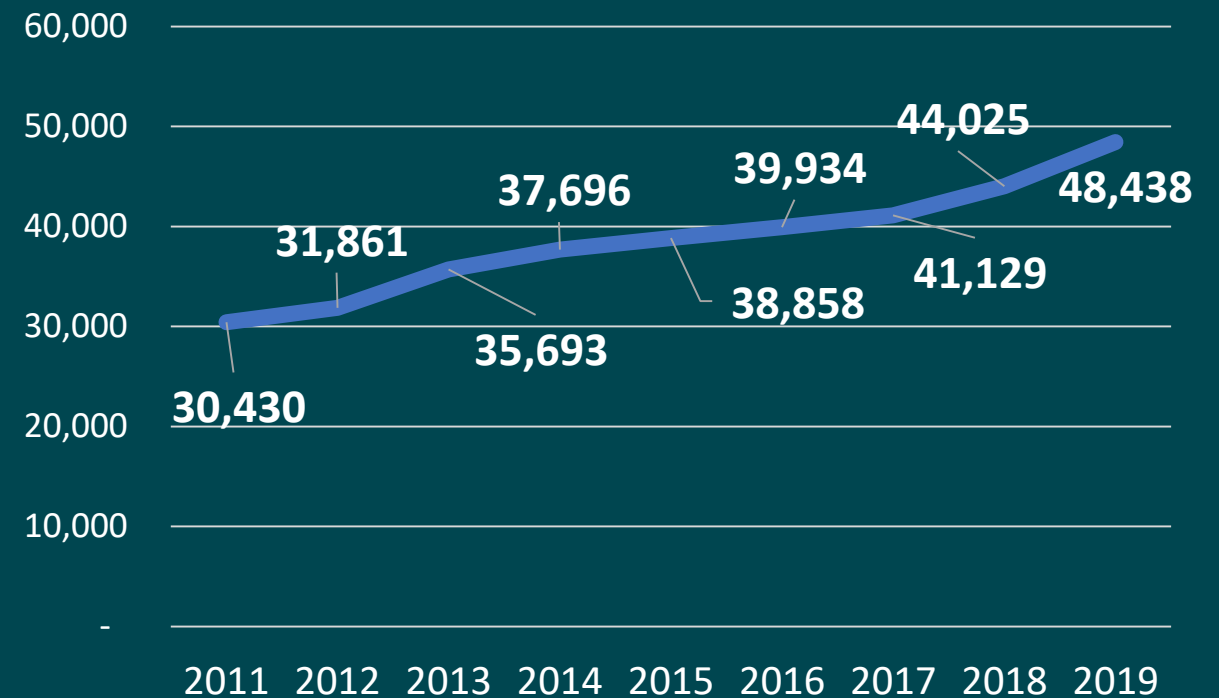
Promising residential market



Hyderabad Residential Sales (No. of units)



Hyderabad Weighted Average Residential Prices (INR/sq m)



Residential prices steady even during COVID crisis

Investments & Other Asset Classes



INVESTMENTS

- USD 2.1 bn PE investments during 2015-2019 in Hyderabad
 - Of which, 86% i.e. USD 1.9 bn investments in office space
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UPCOMING ASSET CLASSES

- Data Centres: INR 250 bn investments for upcoming mega projects
 - Warehouses: COVID-induced growth in e-commerce has increased demand
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THANK YOU