PROPTIGER™
RESEARCH



REAL INSIGHT
Residential

Jan - March 2025

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OVERVIEW

- In an economic environment marred with uncertainties due to a global trade war initiated by the US administration with the launch of reciprocal tariffs, India has managed to position itself as an outlier, especially in terms of wealth creation. According to the Hurun Global Rich List 2025, the country ranks third in terms of number of billionaires, behind only China and the US. This steady rise in economic strength and entrepreneurial spirit is believed to find its way into real estate, traditionally the most preferred investment option for Indians.
- The growing demand for luxury and ultra-premium homes is further boosted by wealthy Indians living abroad, resulting in a major spike in average property prices in the post-pandemic period. So much so that buying a home in any major residential market is fast becoming out of the question for most people in the world's most populous country.
- The adverse impact of rising property prices (for the January-March quarter, most prime residential markets showed double-digit price growth year-on-year) became more prominent through a dip in sales as well as new supply in the first quarter of the calendar year 2025.
- With India's GDP forecast to grow at a slower pace than earlier projected (India's banking regulator has reduced the growth estimate for the current fiscal year to 6.5% from 6.7%), and the ongoing trade war posing concerns over jobs, buyers as well as developers adopted a cautious approach. Interestingly, homes priced above INR 1 crore drove demand as well as supply even as the affordable housing segment took a backseat.



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ALL INDIA RESIDENTIAL ACTIVITY

New Supply

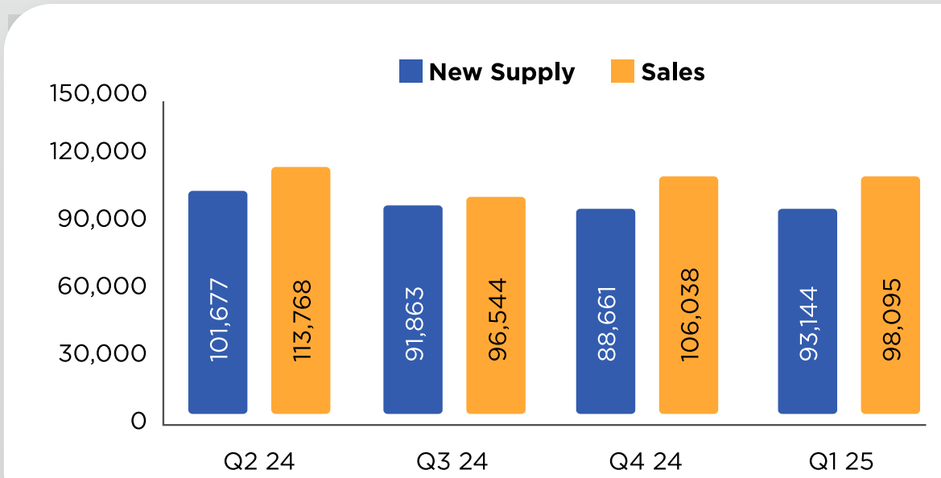
Q1 2024		Q1 2025
103,020	-10%	93,144

Sales

Q1 2024		Q1 2025
120,642	-19%	98,095

(Units in numbers, change in %)

Supply-Demand Trends Quarter-on-Quarter



Source : PropTiger Research

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RESIDENTIAL MARKET
SNAPSHOT Q1 2025

New supply (units)
Sales (units)
Price (INR per sq ft)
% YoY change in Q1 2025
% share in total

AHMEDABAD

2,384		10,730		4,568
-23%	3%	-17%	11%	10%

NCR

7,952		8,477		8,106
16%	9%	-16%	9%	43%

MMR

31,322		30,705		12,600
-15%	34%	-26%	31%	20%

KOLKATA

3,534		3,803		5,839
138	4%	-1%	4%	16%

PUNE

15,543		17,228		7,109
-38%	17%	-25%	18%	18%

HYDERABAD

10,156		10,647		7,412
-33%	11%	-26%	11%	10%

BENGALURU

18,183		11,731		7,881
82%	20%	13%	12%	14%

CHENNAI

4,070		4,774		7,173
-14%	4%	8%	5%	18%



Source : PropTiger Research

NEW SUPPLY

- New supply in India's 8 prime residential markets dipped 10% year-on-year during the January-March quarter of 2025 as developers exercised restraint amid an evolving economic environment.
- MMR, Bengaluru and Pune had the largest share in new supply in Q1, contributing 71% to the overall launches.
- More than half the units launched during the quarter were priced over INR 1 crore amid a rising preference for larger homes of premium quality.



Top 5 Localities Based on New Launches in Q1 2025

Rank	Locality Name	City	Price Range (INR/sqft)	Most Launched Ticket Size (INR)	Most Launched Configuration	Units Launched
1	Beyond Thane	MMR	5,500 - 6,500	45-75 lakh	1BHK	8,866
2	North Bangalore	Bengaluru	9,500 - 10,500	Above 1 crore	3BHK	8,320
3	Hyderabad West	Hyderabad	7,500 - 8,000	Above 1 crore	3BHK	5,403
4	Mira Road & Beyond	MMR	6,500 - 7,000	Above 1 crore	2BHK	5,074
5	Andheri to Dahisar	MMR	17,000 - 18,000	Above 1 crore	2BHK	4,992

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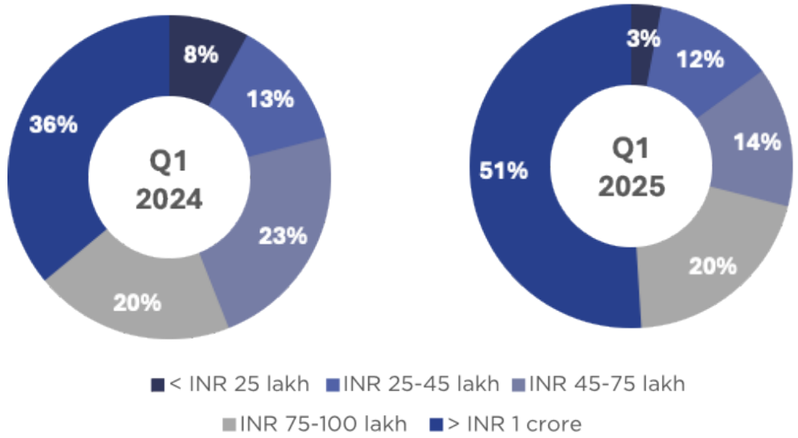
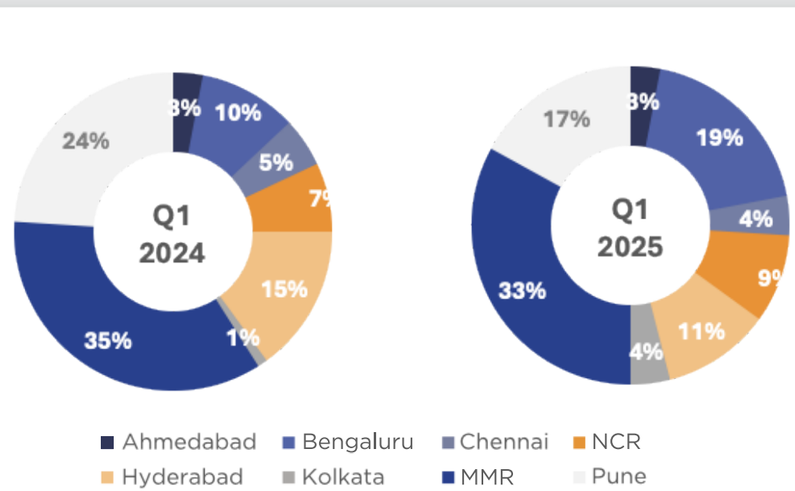
Ticket size-wise Split of Launches



City-wise Share of Launches



Source : PropTiger Research

SALES

- Home sales in the country's leading markets fell 19% in Q1, with all cities registering a decline, barring Bengaluru and Chennai.
- Despite a 26% annual decline in its numbers, MMR contributed the most to quarterly sales, maintaining its dominant position as a residential market.
- 2BHKs were the most sold units during the quarter, claiming a 32% share. At 28%, the 3BHK configuration was the second most preferred option.
- Amid an improvement in developer credibility, buyers seem to be opting for under-construction properties, with 78% of all sales coming from this segment.



Top 5 Localities Based on Sales in Q1 2025

Rank	Locality Name	City	Price Range (INR/sqft)	Most Sold Ticket Size (INR)	Most Sold Configuration	Units Sold
1	Hyderabad West	Hyderabad	7,500 - 8,000	Above 1 crore	1BHK	6,357
2	Beyond Thane	MMR	5,500 - 6,500	75 lakh - 1 crore	1BHK	6,108
3	Andheri to Dahisar	MMR	17,000 - 18,000	Above 1 crore	2BHK	4,302
4	Mira Road and Beyond	MMR	6,500 - 7,000	Above 1 crore	1BHK	3,646
5	Navi Mumbai	MMR	9,000 - 10,000	Above 1 crore	2BHK	3,639

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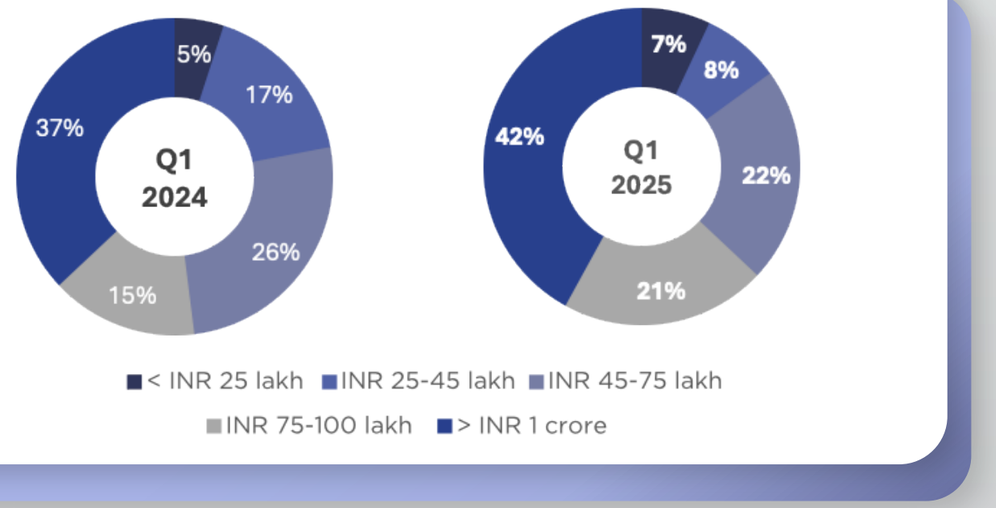
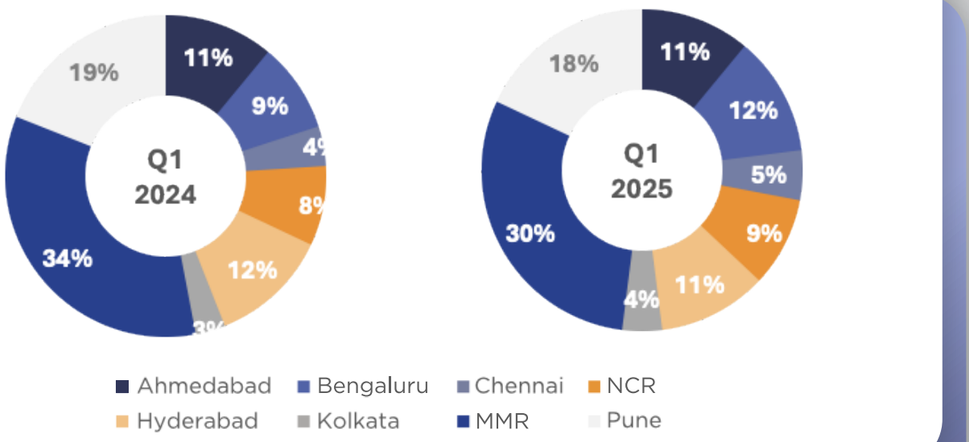
Ticket size-wise Split of Sales



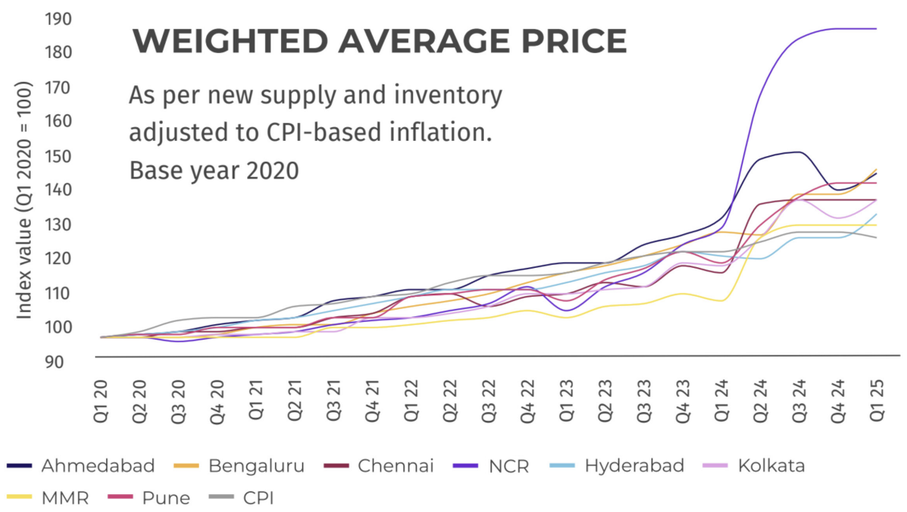
City-wise Share of Sales



Source : PropTiger Research

PRICES

- Average property values across cities increased in double digits in the past one year as an excessive rise in construction & labour costs and enduring demand for luxury housing supported growth.
- The price rally in the National Capital Region continued with average values growing 43% in the past one year as more developers made a beeline to tap the growth potential of this residential market, which is fast becoming a start-up hub.
- While supporting measures by the government and its agencies might bring down the associated costs involved in property acquisition, the sharp value appreciation is likely to have a bearing on future demand.
- Unchecked price growth at this scale could hurt buyer sentiment, leading to a slowdown in sales and a strain on supply, particularly in the affordable housing segment.



Source: PropTiger Research

INVENTORY

- With a 4% annual decline, unsold inventory fell to an eight-quarter low of 8.99 lakh, an indication that demand fundamentals for the sector remain strong despite global headwinds.
- However, growth concerns have pushed the overhang to 26 months despite the dip in the unsold stock.
- MMR, Pune and Hyderabad contribute the most to this unsold stock. Inventory overhang is the highest for MMR and the lowest for Ahmedabad.

City-wise price growth in Q1 2025

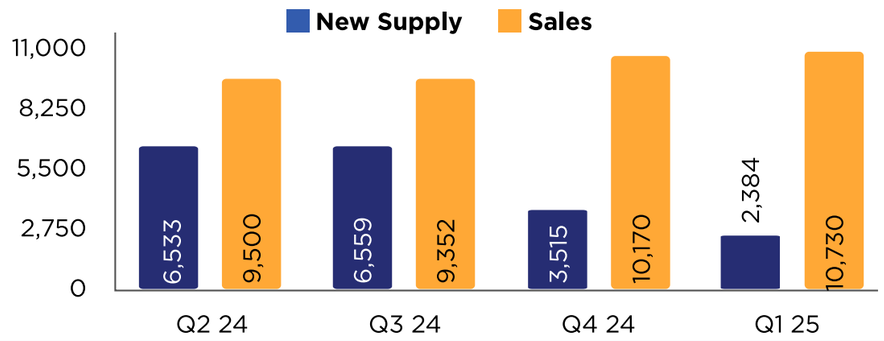
City	Average price in INR/sqft	YoY change
Ahmedabad	4,568	10%
Bengaluru	7,881	14%
Chennai	7,173	18%
NCR	8,106	43%
Hyderabad	7,412	10%
Kolkata	5,839	16%
MMR	12,600	20%
Pune	7,109	18%

Source : PropTiger Research

AHMEDABAD

New Supply		
Q1 2024 3,116	-23%	**Q1 2025** 2,384
Sales		
Q1 2024 12,915	-17%	**Q1 2025** 10,730
Avg. Pricing		
Q1 2024 4,150	10%	**Q1 2025** 4,568

(Units in numbers, change in %, pricing in INR/sqft)



City Highlights

- With apartments becoming the preferred living option for Ahmedabad residents, the speed of RERA approvals has slowed amid a rush of new launches in the past. This regulatory hurdle has led to a dip in launches in the first quarter of 2025.
- At the same time, the demand for housing has entered a corrective phase as capital infusion by investors has moderated. The current demand is coming from end-users, who are more inclined to invest in ready-to-move-in units.

Key Updates

- Gujarat caps housing society transfer fee at 0.5% of the consideration value or INR 1 lakh, whichever is lower
- The state is set to delay implementing new Jantri rates amid public uproar
- The Ahmedabad Bullet Train station's major structural work nears completion; finishing work in progress

TOP 5 LOCALITIES IN AHMEDABAD BASED ON SALES ALONG WITH AVERAGE PRICE

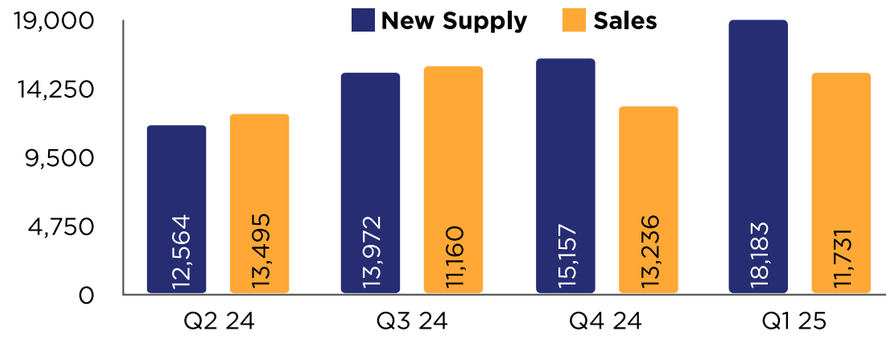


Source : PropTiger Research

BENGALURU

New Supply		
Q1 2024 10,000	82% ▲	**Q1 2025** 18,183
Sales		
Q1 2024 10,381	13% ▲	**Q1 2025** 11,731
Avg. Pricing		
Q1 2024 6,919	14% ▲	**Q1 2025** 7,881

(Units in numbers, change in %, pricing in INR/sqft)

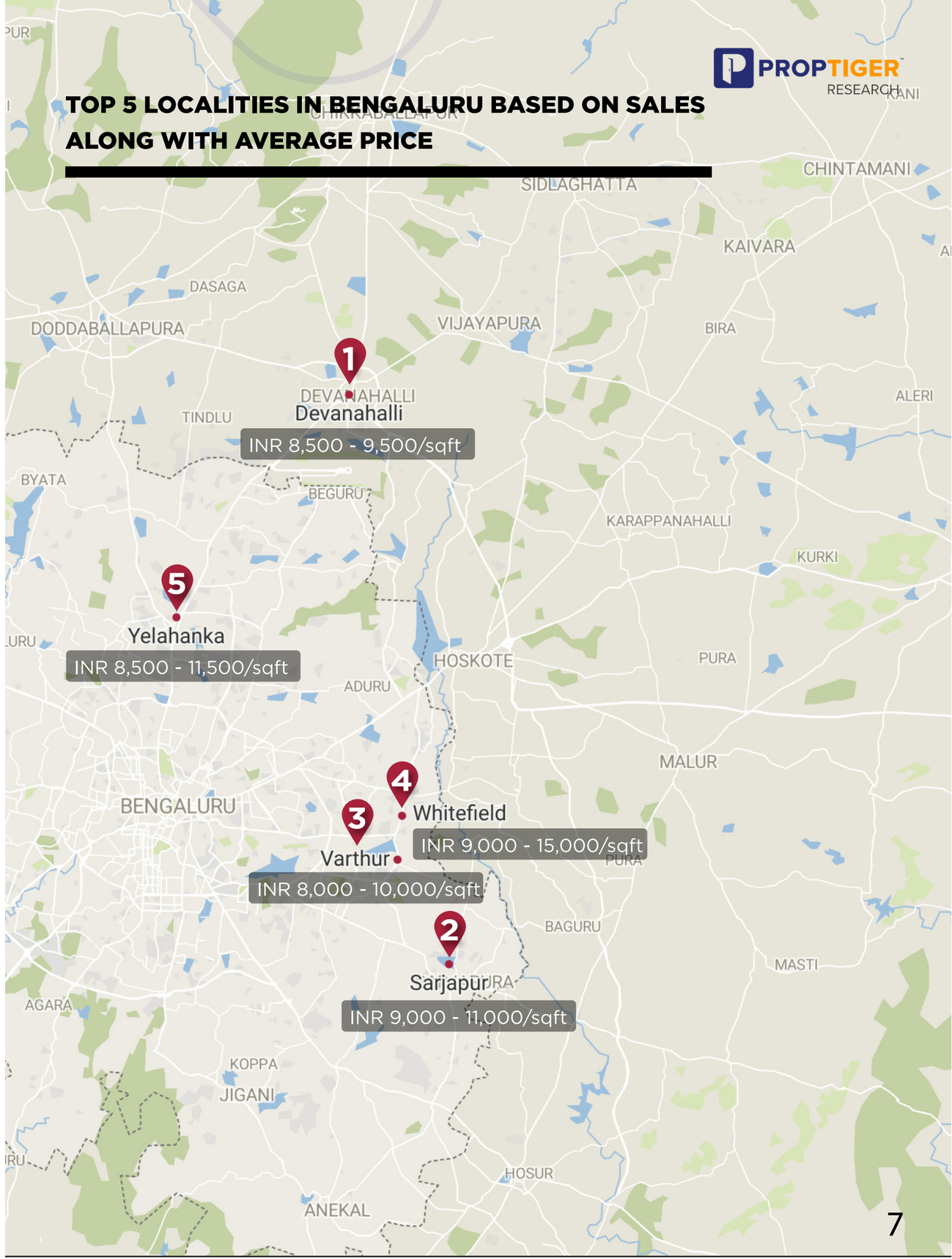


City Highlights

- Both buyer and developer interest in Bengaluru real estate has increased amid a flurry of announcements pertaining to infrastructure upgrades for the city in the recent past.
- However, growing uncertainties for the IT sector, coupled with a spike in the average property price, has adversely affected sales. This trend may continue in the quarters to come.

Key Updates

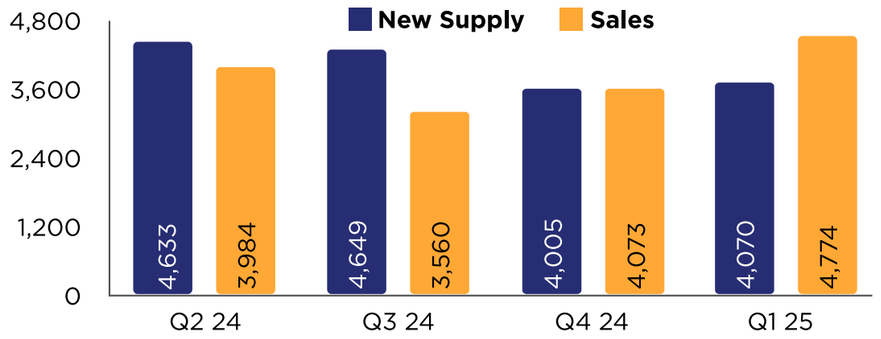
- Karnataka forms panel to speed up INR 27,000-crore Bengaluru Business Corridor
- BBMP to introduce first-in, first-out mechanism to end individual delays in e-khata system
- Brigade launches Brigade Eternia in Yelahanka, with revenue potential of over INR 2,700 crore



CHENNAI

New Supply		
Q1 2024 4,723	-14%	**Q1 2025** 4,070
Sales		
Q1 2024 4,427	8%	**Q1 2025** 4,774
Avg. Pricing		
Q1 2024 6,086	18%	**Q1 2025** 7,173

(Units in numbers, change in %, pricing in INR/sqft)



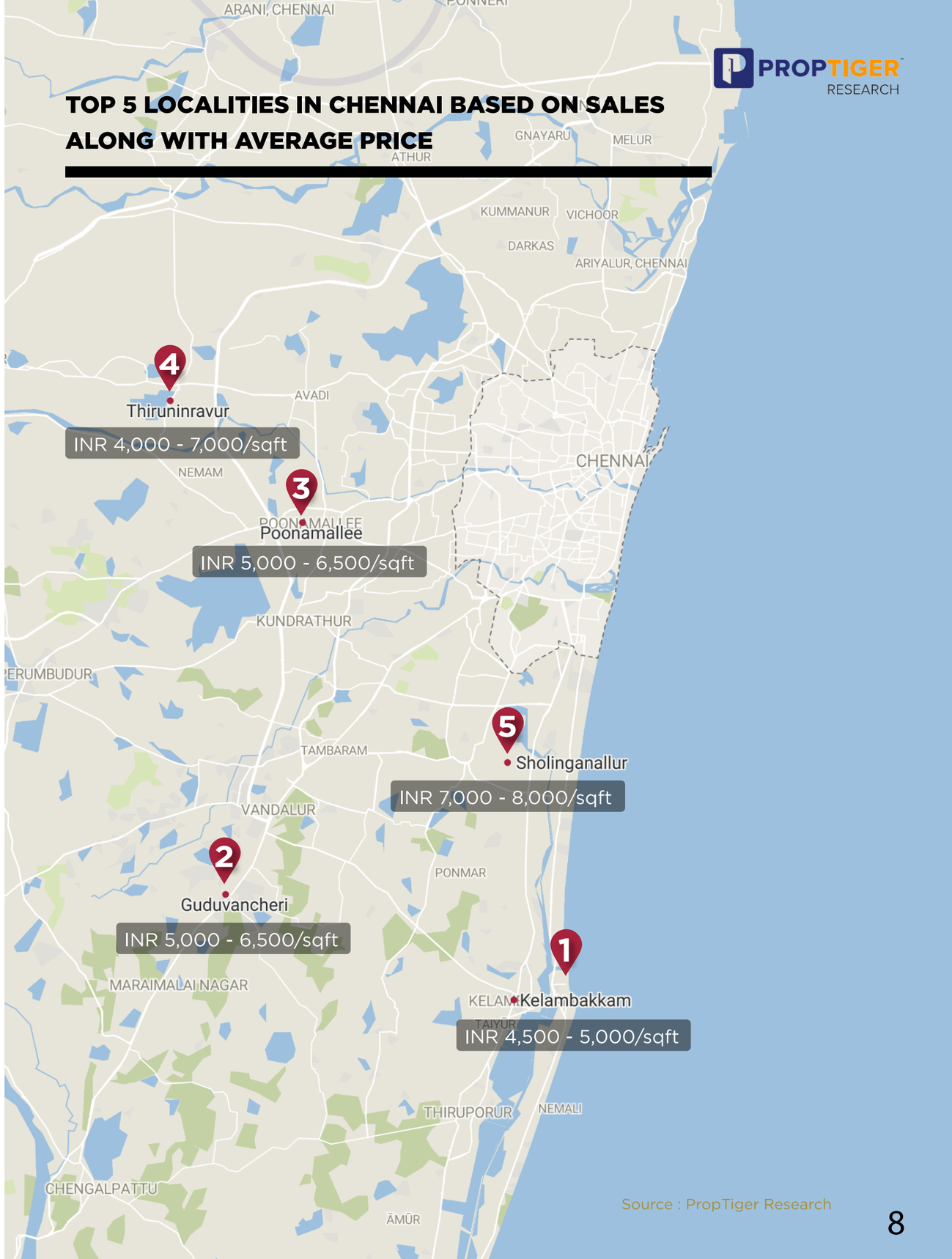
City Highlights

- The IT sector is a critical component of Chennai's job market. As developers evaluate the impact of Trump tariffs, fewer launches were announced in the city in Q1.
- Unlike most mega cities, sales in the Tamil Nadu capital have shown an increase. This aberration, however, has more to do with a low base effect than any significant uptick in demand.

Key Updates

- Tamil Nadu Budget outlines Global City near Chennai, high-speed transport infrastructure
- Plans firm up for developing a new airport in Chennai's Parandur
- Brigade launches Brigade Altius in Chennai with revenue potential of INR 1,700 crore

TOP 5 LOCALITIES IN CHENNAI BASED ON SALES ALONG WITH AVERAGE PRICE



Source : PropTiger Research

NCR

New Supply

Q1 2024		Q1 2025
6,872	16%	7,952

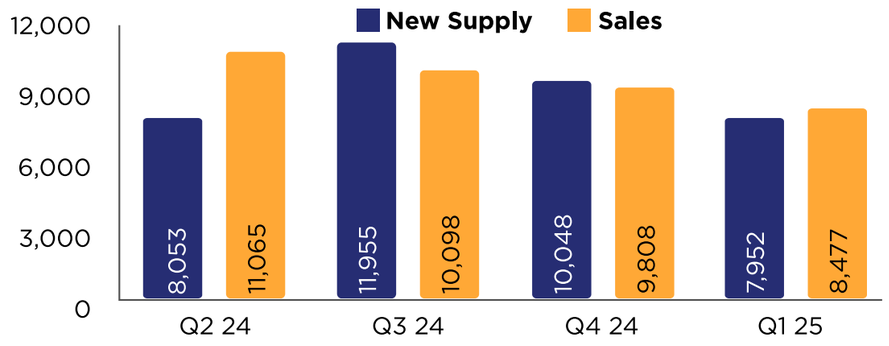
Sales

Q1 2024		Q1 2025
10,058	-16%	8,477

Avg. Pricing

Q1 2024		Q1 2025
5,655	43%	8,106

(Units in numbers, change in %, pricing in INR/sqft)



City Highlights

- With the NCR emerging as a major hub for start-ups and high-income professionals, developers are seen announcing tailor-made offerings to tap the growing demand for high-end luxury.
- Soaring property prices and job market uncertainties, however, had an impact on sales during the quarter. The average ticket size in this region has also increased significantly, raising affordability concerns.

Key Updates

- Greater Noida authority hikes land rates by 5%
- Housing Ministry approves Delhi Metro Yellow Line's extension till Sonipat
- Macrotech Developers exploring entry into Delhi-NCR housing market

TOP 5 LOCALITIES IN NCR BASED ON SALES ALONG WITH AVERAGE PRICE

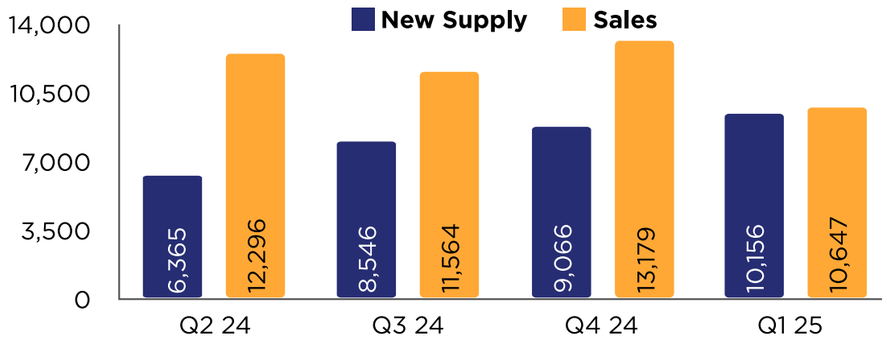


Source : PropTiger Research

HYDERABAD

New Supply		
Q1 2024 15,095	-33%	**Q1 2025** 10,156
Sales		
Q1 2024 14,298	-26%	**Q1 2025** 10,647
Avg. Pricing		
Q1 2024 6,753	10%	**Q1 2025** 7,412

(Units in numbers, change in %, pricing in INR/sqft)

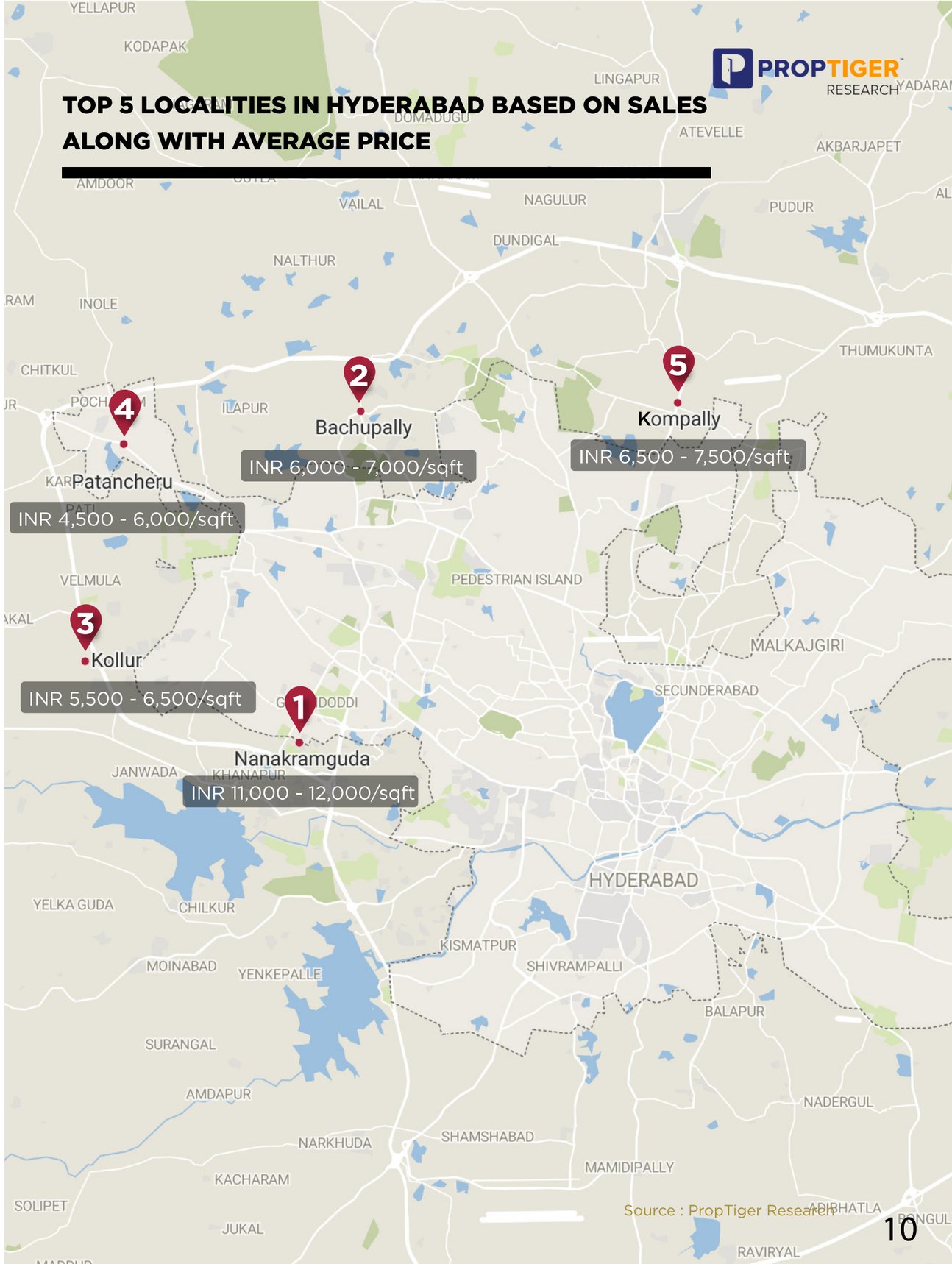


City Highlights

- A price spike has also had a detrimental effect on new supply in the City of Nizams. Slower project approval rates seem to have further exacerbated the situation in Q1, with launches dipping 33% year-on-year.
- After a sustained period of growth, this housing market is now neck and neck with Bengaluru. An increase in pricing has impacted the housing affordability of average IT employees, leading to a dip in end-user demand in the city.

Key Updates

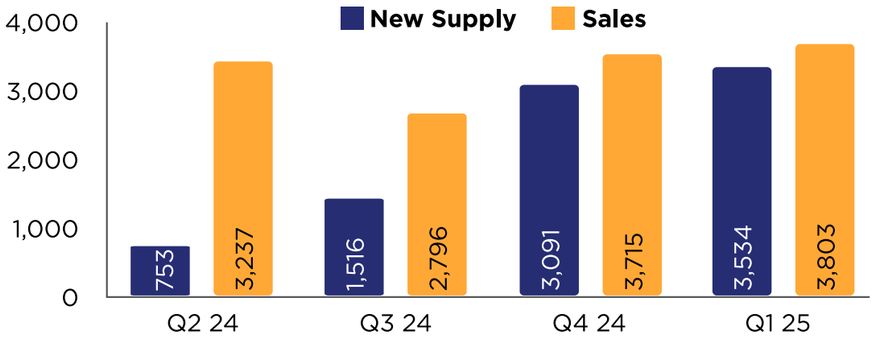
- Telangana unveils Mega Master Plan 2050 to transform Hyderabad into a global city
- State govt amends property registration rules; set to allow concessions for illegal layouts
- Godrej sells properties worth over INR 1,000 crore in its maiden project in Kokapet



KOLKATA

New Supply		
Q1 2024	138%	Q1 2025
1,485		3,534
Sales		
Q1 2024	-1%	Q1 2025
3,857		3,803
Avg. Pricing		
Q1 2024	16%	Q1 2025
5,045		5,839

(Units in numbers, change in %, pricing in INR/sqft)



City Highlights

The Real Estate Authority in the state fast-tracked the pace of project approval in the past six months, manifesting in an uptick in supply numbers in the first quarter.

- Sales during the quarter saw a slight moderation as price growth sharpened. The impact on sales here was limited because Kolkata is currently the most affordable major market included in the analysis.

Key Updates

- Merlin Group partners with FashionTV to launch Kolkata's first luxury FTV-branded residences
- ADB approves a $200 million loan to upgrade Kolkata's sewerage and drainage systems
- US investment giant Blackstone is set to acquire Kolkata's iconic South City Mall in the city's largest real estate deal

TOP 5 LOCALITIES IN KOLKATA BASED ON SALES ALONG WITH AVERAGE PRICE

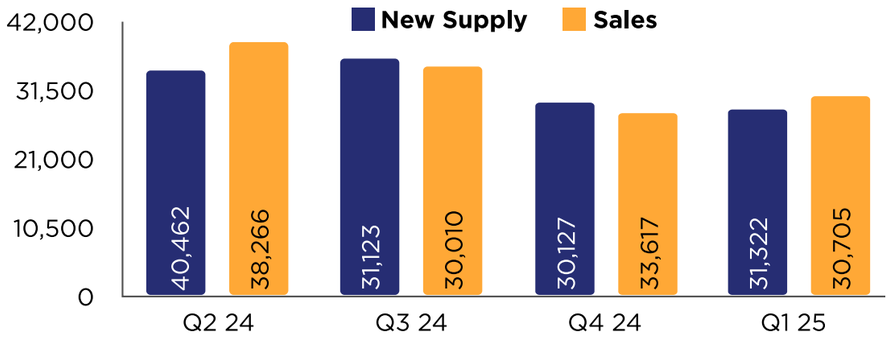


Source : PropTiger Research

MMR

New Supply		
Q1 2024 36,784	-15%	**Q1 2025** 31,322
Sales		
Q1 2024 41,594	-26%	**Q1 2025** 30,705
Avg. Pricing		
Q1 2024 10,500	20%	**Q1 2025** 12,600

(Units in numbers, change in %, pricing in INR/sqft)



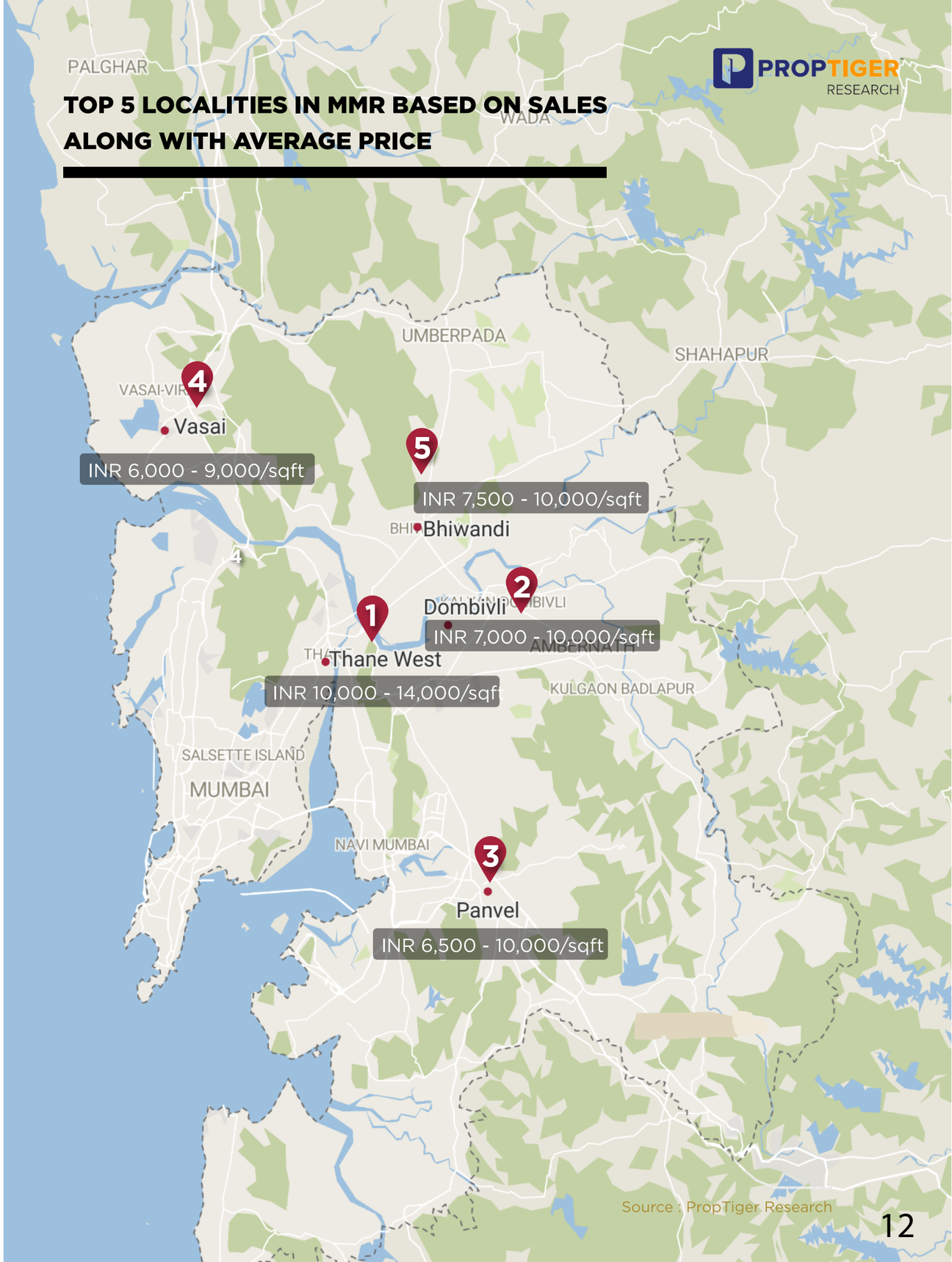
City Highlights

- Hurdles related to environmental clearances severely affected launches during the quarter, prompting developer bodies to move the Supreme Court.

  Sales in MMR, the most expensive housing market in India, showed a sharp decline as buyers and investors braced for the impact of US trade tariffs on India's financial capital.

Key Updates

- Ready reckoner rates hiked by 3.4% in Mumbai
- India to build its first offshore airport near Mumbai on lines of Hong Kong International Airport, Osaka's Kansai International Airport
- MICL unveils 306-mt-high Avaan Tower 2, touted to be India's tallest ultra-luxury skyrise



PUNE

New Supply

Q1 2024		Q1 2025
24,945	-38%	15,543

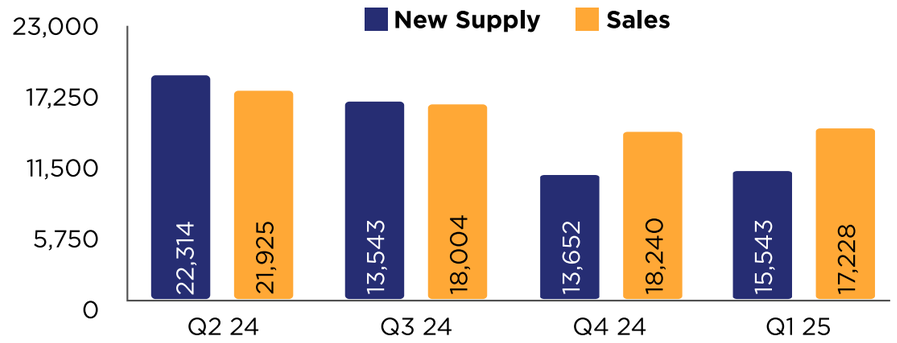
Sales

Q1 2024		Q1 2025
23,112	-25%	17,228

Avg. Pricing

Q1 2024		Q1 2025
6,000	18%	7,109

(Units in numbers, change in %, pricing in INR/sqft)

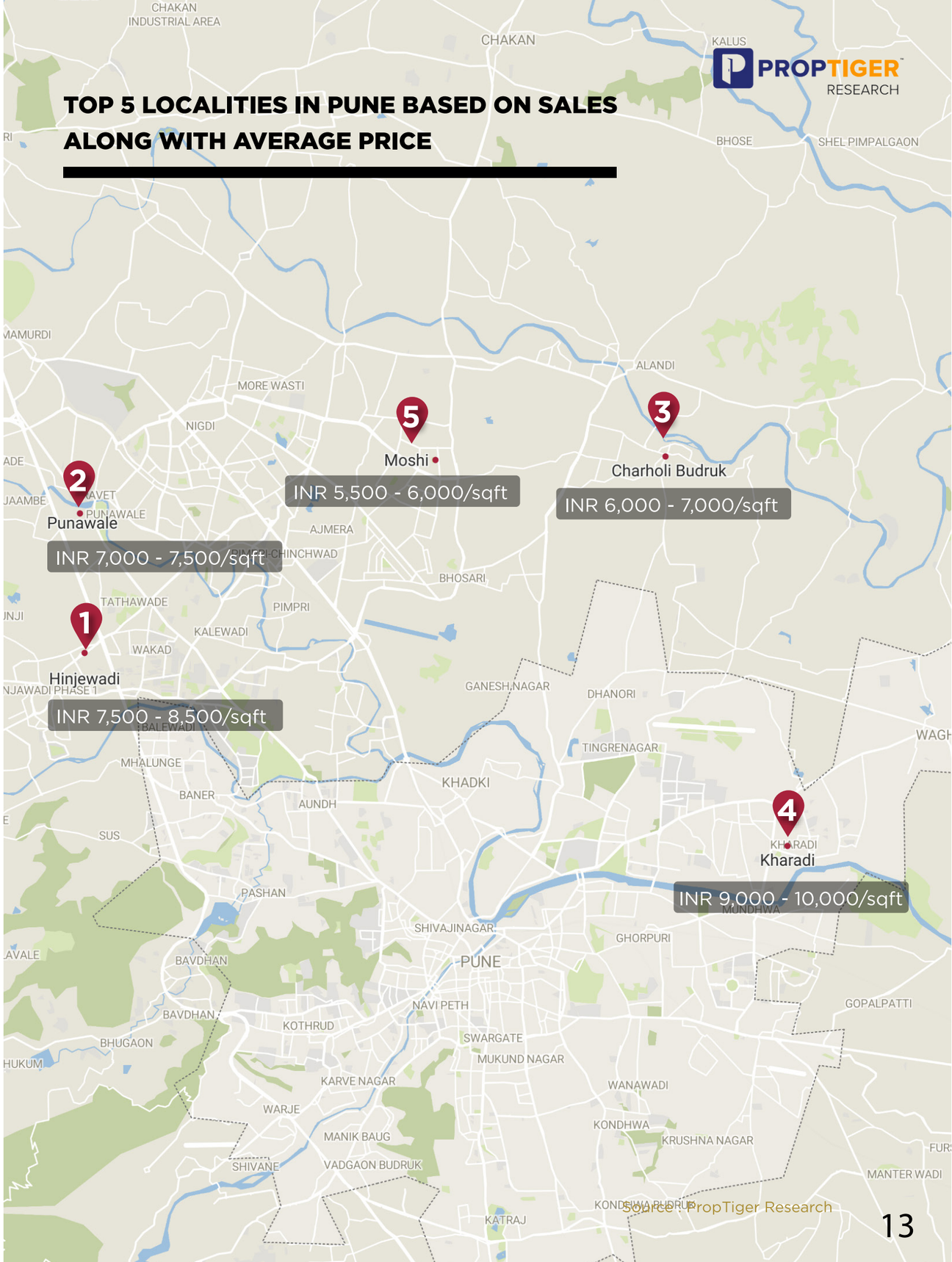


City Highlights

- With the new government taking over in December, the pace of project approvals has been impacted, reflected in a dip in launches in Pune.
- The effect of looming employment uncertainties is also visible on housing demand in this IT hub, where sales dipped 25% YoY.

Key Updates

- Ready reckoner rates hiked by 6.8% in Pune
- 23.2 km of Metro lines set to be launched in Pune this year
- Birla Estates launches first residential project in Pune's Sangamwadi



OUTLOOK

- US President Donald Trump’s tariff war would no doubt have a deep impact on most countries, India included. However, India is better positioned to withstand initial shocks due to the sheer size of its economy and the age composition of its population.
- According to the International Monetary Fund, India is projected to become the world’s fourth-largest economy in 2026 surpassing Japan. It could, in fact, surpass Germany, the world’s third-largest economy, by 2028, if it were to continue this growth trajectory. This is in contrast with most advanced economies that are facing an economic slowdown due to chronic shortages, high inflation and aging populations.
- Meanwhile, at 3.34%, India’s retail inflation eased to a more-than-five-year low in March as food prices continue to moderate. On similar cues, wholesale inflation, a proxy for producer prices, moderated to a four-month low in the same month. At the same time, predictions of above-average monsoon rains for a second straight year in 2025 have raised expectations of higher farm and economic growth in Asia's third-biggest economy.
- All these factors would allow the RBI more room for rate cuts in 2025 after a 50-bp reduction in rate this year, prompting buyers to invest in real estate, buoyed by falling borrowing costs. However, it might take a couple of quarters before sales and supply enter the green zone as the tariff-induced global trade war plays out. In case the sweeping tariffs trigger a slowdown in the US, housing markets in the IT-driven cities of Bengaluru and Pune could be considerably affected while a general slump in demand can’t be ruled out.

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Annexure - I

Glossary

New supply
It includes the new units launched in a new project or an already launched project during the quarter or the mentioned duration.

Sales
It includes the units sold in all the available projects (including newly launched projects) during the quarter or the mentioned duration.

Inventory overhang
It represents the number of months required to offload the existing stock in the market.

Sales velocity
It is calculated as the ratio of monthly sales to the total supply.

Price
It is the weighted average price of the total supply.

Note: Analysis in the report includes apartments and villas only. RERA registration date is considered as day zero for recording new supply and sales.

Annexure - II

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Geographical Spread of Report

CITY	MICRO MARKET	PROMINENT LOCALITIES
Ahmedabad	Ahmedabad Central	Ellisbridge, Paldi, Saraspur, Vasna
	Ahmedabad East	BapuNagar, Nava Naroda, New Maninagar, Nikol, Odhav, Vastral
	Ahmedabad North	Chandkhera, Gota, Motera, Nana Chiloda, Ranip, Vadsar
	Ahmedabad South	Vatva, Narol, Narolgam, Isanpur, Changodar
	Ahmedabad West	Bopal, Ghuma, Shela, Sarkhej, Shilaj, Sanand, Vastrapura
	SG Highway	Near Nirma University on SG Highway, Near Vaishno Devi circle on SG Highway, Thaltej, Chanakyapuri
	Gandhinagar	Urjanagar, Sargaasan, Gift City, Zundal, Rayson
Bengaluru	Central Bengaluru	Ashok Nagar, Richmond Town, Marathahalli, Bellandur, Frazer Town, Koramangala
	East Bengaluru	Whitefield Hope Farm Junction, CV Raman Nagar, KR Puram, Mahadevapura, Harlur, Sarjapur, ITPL, Varthur, BudigereCross
	North Bengaluru	Yelahanka, Doddaballapur, Hebbal, Thanisandra, Jakkur, Kodigehalli, Kannur
	North East Bengaluru	Horamavu, Devanahalli, Narayanapura, Hennur, Banaswadi, Kalyan Nagar
	North West Bengaluru	Jalahalli, Yeshwantpur, Nelamangala Town, Rajaji Nagar, Near Peenya Industrial Area
	South Bengaluru	Begur, JP Nagar, Bommanahalli, Gottigere, Hosa Road, Padmanabha Nagar, Hulimavu
	South East Bengaluru	Electronics City, Hosur, Anekal City, Jigani, Chandapura, Attibele, Bommasandra, Narayanaghatta, Avalahalli
	West Bengaluru	Kumbalgodu, Kengeri, Nagarbhavi
Chennai	Chennai Central	Anna Nagar, Alwarpet, Guindy, Raja Annamalai Puram, Vadapalani
	Chennai North	Perembur, Madhavaram, Kolathur, Ponneri
	Chennai South	Perrumbakkam, Mambakkam, Thiruporur
	Chennai West	Avadi, Koyembedu, Manapakkam, Mangadu, Mogappair, Vanagram, Thirumazhisai, Mevalurkuppam, Ambattur
	ECR	Injambakkam, Thiruvanmiyur, Kanathur Reddikuppam
	GST	Guduvencheri, Perungalathur, Singaperumal Koil, Orgadam, Maraimalai Nagar, Tambaram, Chromepet
	OMR	Padur, Perungudi, Sholinganallur, Siruseri, Thalambur, Medavakkam, Kelambakkam,Tiruporur Near Kelambakkam
	Vandalur	Kelambakkam Road Moolacheri, Nallambakkam
Delhi – NCR	Faridabad	Ballabhgarh, Greater Faridabad, Hodal, NH2, Surajkund
	Ghaziabad	Ghaziabad Central, Indirapuram, Kaushambi, NH 24, NH57, NH58, Sahibabad, Vaishali, Vasundhara, Bhopura
	Greater Noida	Noida Extension, Yamuna Expressway (Chi 5, TechZone),Bodaki, Eta, Beta, Knowledge Park, Omnicron, Pi, Surajpur, Swarn Nagari, Zeta
	Gurugram	Dwarka Expressway(Sector 35-37,84, 88, 89, 99,102-113), Golf Course Extension Road(Gwal pahari, sector 59 - 63, 65), Gold Course Road (Sector 28, 42, 54), Gurgaon Central, Manesar, New Gurgaon (Sector 76-82,85-93, 95), Old Gurgaon, Sohna & Sohna Road(Sector 48,67,68), Southern Peripheral Road (Sector 69 - 72)

CITY	MICRO MARKET	PROMINENT LOCALITIES
Hyderabad	Hyderabad West	Hitec City, Gachibowli, Manikonda, Narsingi, Serilingampally, Nallagandla Gachibowli, Kondapur, Chandanagar, Hafeezpet, Bachupally, Miyapur
	Hyderabad North	Kompally, Tellapur, Kukatpally, Nizampet, Bolarum, Bahadurpally, Shamirpet
	Hyderabad South	Saidabad, Kismatpur, Maheshwaram, Shadnagar , Rajendra Nagar
	Hyderabad East	LB Nagar, Nagole, Hayathnagar, Vanasthalipuram, Uppal Kalan, Saroor Nagar
	ORR South	Bongloor, Shamshabad, Adibatla, Pocharam
	Secunderabad	Mallapur, Yapral, Sainikpuri, Alwal, AS Rao Nagar
	Hyderabad Central	Somajiguda, Ameerpet, Himayat nagar, Jubilee Hills, Begumpet, Banjara Hills
Kolkata	Kolkata East	New Town, Rajarhat, Salt Lake City, Tangra, Beliaghata
	Kolkata North	Dum Dum, Madhyamgram, Barasat, Barrackpore, Lake Town, Rishra
	Kolkata South	Baruipur, Behala, Joka, Garia, Narendrapur, Sonarpur, Uttar Gauripur, Tollygunge, New Alipore, Mukundapur
	Kolkata West	Serampore, Howrah, Uttarpara Kotrung, Konnagar
	Kolkata Central	Sealdah
MMR	Andheri to Dahisar	Andheri, Borivali, Dahisar, Goregaon, Jogeshwari, Kandivali, Malad
	Worli to Andheri	Bandra, Dharavi, Juhu, Khar, Mahim, Santacruz, Ville Parle
	Central Mumbai	Bandra Kurla Complex, Bhand up, Ghatkopar, Kanjurmarg, Kurla, Matunga, Mulund, Powai, Sion, Vikhroli
	Mumbai South	Colaba, Narimat Point, Dadar, Worli, Byculla, Mahalaxmi, Parel, Lower Parel, Girgaon, Prabhadevi
	Mumbai Harbour	Sewri, Wadala, Chembur, Mazegaon
	Mira Road and Beyond	Mira Road, Vasai, Virar, Nala Sopara, Bhayandar, Boisar, Naigaon East, Palghar
	Navi Mumbai	Airoli, Belapur, Kharghar, Taloja, Dronagiri, Ghansoli, Karanjade, Ulwe, Vashi, Warai
	Thane	Thane East & Thane West
	Beyond Thane	Ambernath, Badlapur, Bhiwandi, Dombivali, Kalyan, Karjat, Neral, Vangani, Ambivali, Anjurdive, Ulhas Nagar, Shil Phata
	Panvel and Beyond	Panvel, Khopoli, Rasayani, Khalapur, Kewale, Umroli, Pen, Chowk
Pune	PCMC	Chikhali, Ravet, Wakad, Tathawade, Moshi, Mamurdi, Jambhul, Pimpri, Rahatani, Gahunje
		Chinchwad
	Pune South	Dhayari, Kondhwa, Undri, Ambegaon Budruk, Phursungi, NIBM Annex Mohammadwadi, Handewadi, Shirwal, Shivapur, Baramati, Nasrapur, Katraj, Bibwewadi
	Pune West	Hinjewadi, Pirangut, Bavdhan, Mahalunge, Baner, Mugawade, Balewadi, Bhukum, Kothrud, Kamshet, Bhugaon
	Pune North	Talegaon Dabhade, Alandi, Chakan, Dhanori, Rajgurunagar, Dehu
	Nagar Road	Wagholi, Kharadi, Lohegaon, Lonikand, Sanaswadi
	Pune Solapur Highway	Hadapsar, Manjari, Uruli Kanchan, Loni Kalbhor
	Mumbai Pune Bypass	Vadgaon Budruk, Sus, Warje, Shivane, Karve Nagar
	Pune East	Mundhwa, Bakhori, Kedagaon, Daund

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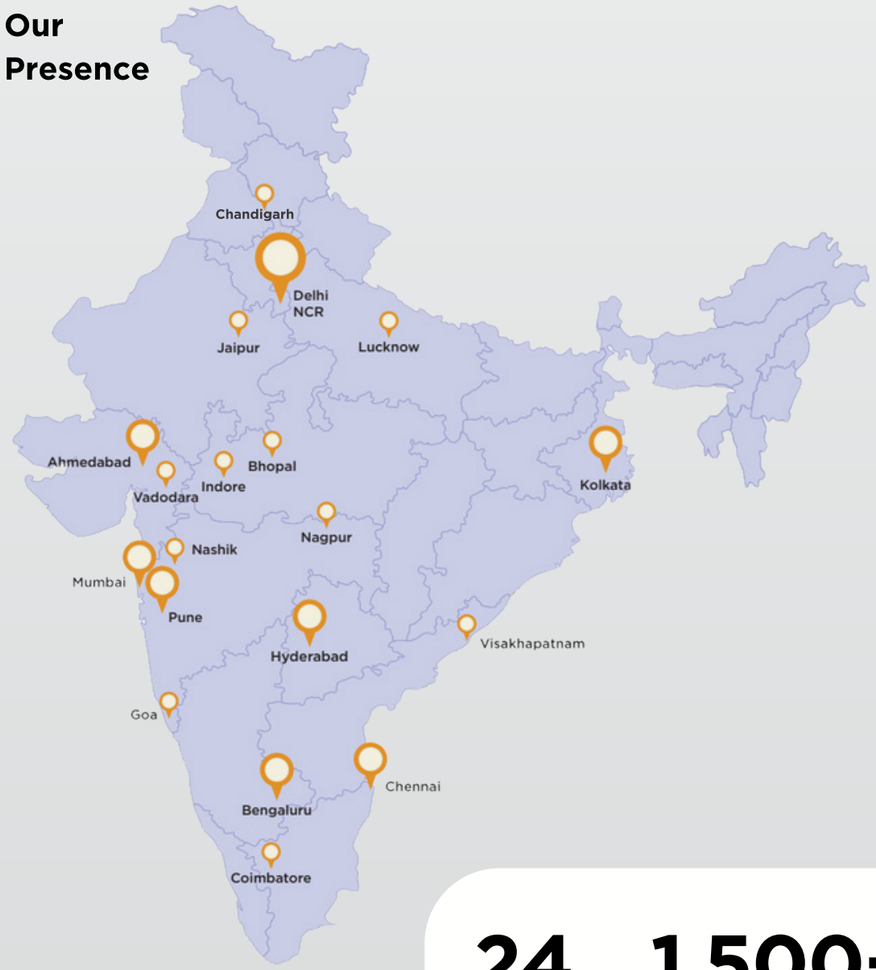

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