

REOS

JULY — SEPTEMBER 2026

DUBAI Q3 *Report*

112

ZONES SCORED & RANKED

36,735

SALES · Q3 2026

78

FULLY SCORED

5.3%

MEDIAN GROSS YIELD

Q3 2026 · 36,735 SALES · AED 84.82B · TRAILING-3Q DEALS 123,048 · SOURCE — REOS INTELLIGENCE ENGINE · TAGGING V6.1

DATA THROUGH 30 SEP 2026 · PUBLISHED OCT 2026 · REOS.ALTCTRL.AI

DUBAI · UAE · P.01

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FOREWORD · THE INTELLIGENCE ENGINE

The Whole City, One Data Model

All **112 of Dubai's districts** are scanned, scored, and ranked from a single district profile each. Q3 2026 recorded **36,735 sales** worth **AED 84.82B** on the Dubai Land Department (DLD) deed register, alongside **231,800 rental contracts** in the zone rent slice. Four quarters of history carry **180,553** zone-level deals; the trailing three-quarter window used for the current signal contains **123,048** deals.

112

DISTRICT PROFILES

one per area

36,735

Q3 SALES PRICED

AED 84.82B · DLD

78

ZONES FULLY SCORED

34 on watch · thin data

9

HEADLINE INVESTABLE

3 BUY · 6 BUILD

THE ENGINE

One profile per district. One signal per profile.

Every metric traces to government transaction data, derived by fixed rules and ranked against the other 111 zones. Scores are frozen once written — no recomputation, no drift, no interpretation between the record and the page.

Zones below the data threshold are held on WATCH rather than scored. Coverage expands as deed volume accumulates.

EXECUTIVE SUMMARY

Seven Things That Define Q3 2026

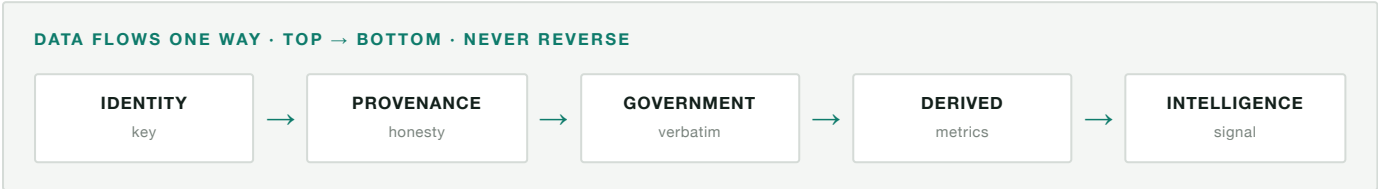
A disciplined read of Dubai straight from the intelligence engine — actionable zones first, then the city base case.

- 01** **The signal is conservative by rule.** Across 112 zones the split is **3 BUY / 6 BUILD / 69 HOLD / 34 WATCH**. BUY needs both market and development conditions in place — never one alone.
- 02** **Headline actionable basket is 9 zones** (BUY + BUILD with a sale price). Lead with Dubai Festival City / مدينة دبي فستيفال, Al Quoz / القوز, and Jebel Ali Industrial / جبل علي الصناعية. Engine tags still count 9 — capped / rental-only shells are gated from the marquee list. Do not lead with the 69 HOLD base case.
- 03** **Market past the trough; BUY is early-recovery, not deep-contrarian.** Mainstream prices are correcting while registered value stays large (AED 84.82B in Q3); REOS BUY means accumulate — priced low, momentum only just turning.
- 04** **Median yield 5.3%** on official rent/sqm († = yield at listed AED/sqm where the engine sale basis differs). Median sale price **19,447 AED/sqm**.
- 05** **DLD deeds 36,735 · value AED 84.82B.** Zone-slice Q3 deals 36,735; trailing-3Q 123,048.
- 06** **Zone movement:** 3 zones newly BUY/BUILD vs Q1; 19 zones fell off an active signal. Tag turnover is high because the gate re-reads a trailing window each quarter — the 2–3 yr BUY horizon is the holding thesis, not a lock on the label.
- 07** **Forward returns** use the $\pm 39\%$ base-case band — FULL-tier only; otherwise projection withheld with reason.

03 · THE DISTRICT PROFILE

Five Layers, One Truth

Every Dubai district carries one complete profile. Five layers, strictly separated, data flowing one way — from raw government record to final signal. Nothing below ever rewrites what sits above.



●	identity	Permanent REOS key: country, city, zone, currency, unit. Never a government ID.
●	provenance	The honesty layer: sources, coverage gates, quality flags, quarantined quarters.
●	government	Verbatim registry: sales, rents, type profiles. Never edited, renamed, or recomputed.
●	derived	Deterministic metrics: growth, volatility, drawdown, yield, velocity. Flagged when estimated.
●	intelligence	Market Score + Development Score → one BUY / BUILD / HOLD / WATCH call.

112

DISTRICT PROFILES

one per area

2

PILLARS

market · development

4

SIGNALS

BUY · BUILD · HOLD · WATCH

1

ENGINE READ

tag from the signal

VERSIONED AND REPRODUCIBLE

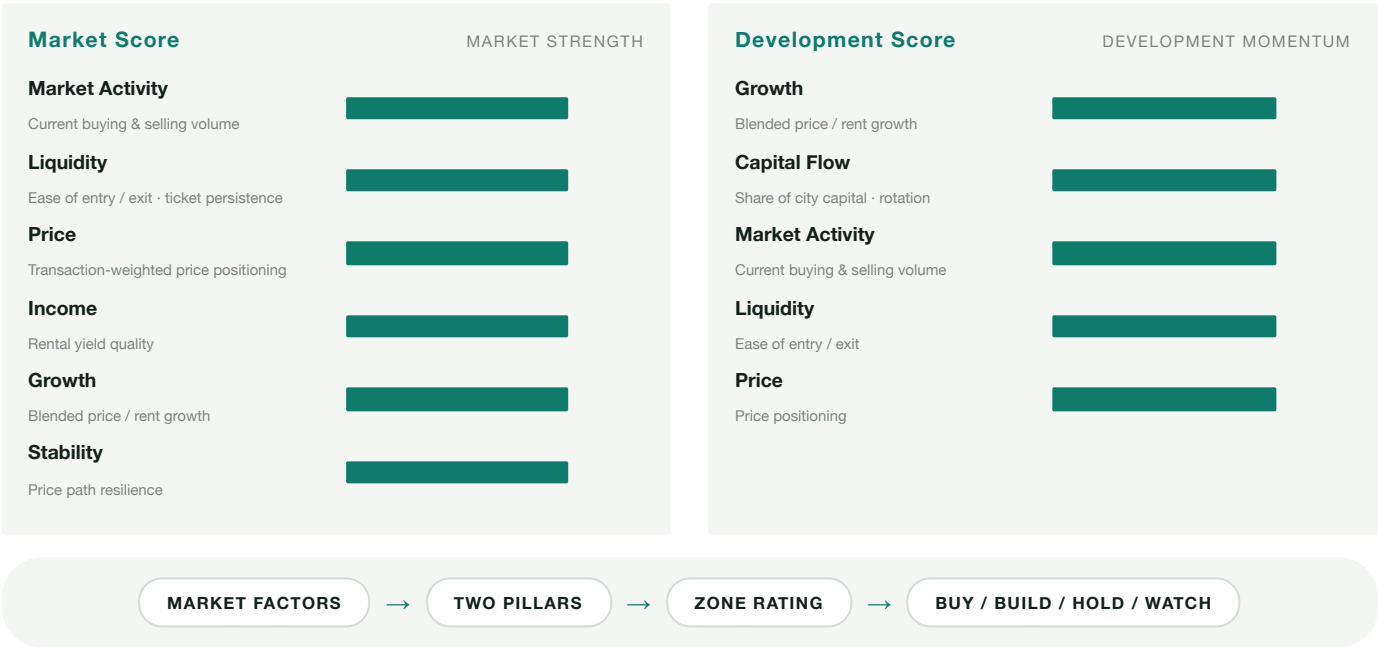
Every profile carries its own data-shape and methodology version — recomputable bit-for-bit from its own government layer. The renderer only reads; it never re-derives.

Raw record in. Ranked signal out.

04 · HOW WE SCORE

Two Pillars, One Zone Rating

Each zone is read on **Market Score** (strength now) and **Development Score** (building momentum). The **REOS Score** combines both. The tag — BUY, BUILD, HOLD, or WATCH — is the engine’s action call on that rating.



05 · TAG REFERENCE

What Each Tag Means

Each tag is an action call. Read the meaning below whenever BUY, BUILD, HOLD, or WATCH appears.

TAG	MEANING	HORIZON
BUY	opportunity to build a position — prices still soft, upside not yet in (2–3 yr)	2–3 yr
BUILD	supply-led opportunity — follow delivery in the zone (9–15 mo)	9–15 mo
HOLD	solid today — no active entry or exit call	—
WATCH	thin trading — monitor only	—

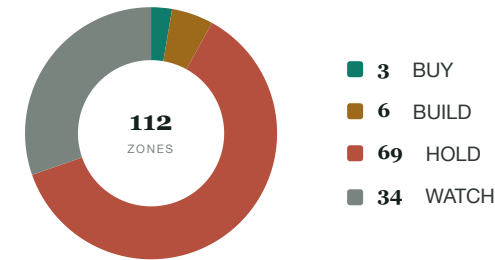
3	6	69	34
BUY	BUILD	HOLD	WATCH
build a position	follow supply	no active call	monitor only

06 · THE VERDICT

Just Tell Me Where to Act

Headline actionable zones first (sale-priced BUY + BUILD) — then the distribution that proves the screen is conservative. Engine tag counts remain 3+6; capped / rental-only shells are footnoted, not headlined.

SIGNAL DISTRIBUTION



TOP BUY MODEL FINGERPRINT

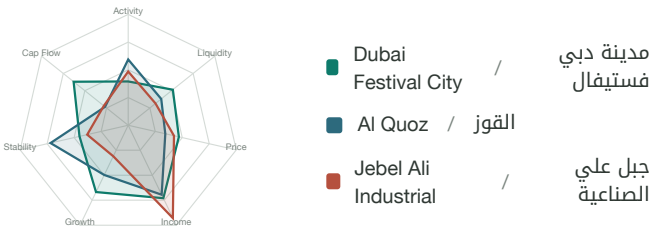


EXHIBIT — HEADLINE ACTIONABLE (9 · BUY + BUILD)

AREA	SIGNAL	REOS	AED/SQM	YIELD
Dubai Festival City / مدينة دبي فستيفال	BUY	53.7	14,493	6.6%
Al Quoz / القوز	BUY	47.9	7,673	9.4%
Jebel Ali Industrial / جبل علي الصناعية	BUY	41.5	13,201	—†
Jumeirah Village Circle / قرية جميرا الدائرية	BUILD	71.3	14,264	6.8%
Jebel Ali / جبل علي	BUILD	66.8	18,936	5.0%
Al Furjan / الفرجان	BUILD	61.7	15,182	—†
Mirdif / مردف	BUILD	59.7	9,526	4.7%
Dubai Silicon Oasis / واحة دبي للسيليكون	BUILD	57.9	12,618	6.2%
Dubai Investment Park / مجمع دبي للاستثمار	BUILD	55.0	9,966	5.3%

† Yield print uses official rent ÷ listed AED/sqm when the engine yield's sale basis differs from the listed price (or fails price-band sanity). Tags/scores unchanged.

06B · PRICE MOVE

Price Move
Q2 → Q3

Q2 Where-to-Act basket — residential AED/sqm from the call quarter into live Q3. Full basket KPIs below; table shows the largest |%| movers (top 18 BUY + 6 BUILD).

19	6	-5.2%	+26.6%
BUY ZONES	BUILD ZONES	MEDIAN CHANGE	BIGGEST MOVER
19 priced	6 priced	All priced pairs	Umm Al Sheif

TOP |%| MOVERS · ▲ UP · ▼ DOWN · NAME MARK = |Δ| ≥ 50%

BUYQ2 Where-to-Act · top 18 by |%| · 19 zones

ZONE	Q2 AED/SQM	Q3 AED/SQM	CHANGE
Jumeirah / جميرا	44,872	53,951	+20.2% ▲
Bur Dubai / بر دبي	24,631	21,656	-12.1% ▼
Downtown Dubai / وسط مدينة دبي	38,588	34,268	-11.2% ▼
Dubai Silicon Oasis / واحة دبي للسيليكون	14,126	12,618	-10.7% ▼
Jumeirah Lake Towers / أبراج بحيرات جميرا	19,993	17,997	-10.0% ▼
Damac Lagoons / داماك لاجونز	15,291	14,184	-7.2% ▼
Jumeirah Village Circle / قرية جميرا الدائرية	15,324	14,264	-6.9% ▼
DIFC / مركز دبي المالي العالمي	43,301	40,443	-6.6% ▼
Dubai Harbour / ميناء دبي	47,903	44,920	-6.2% ▼
Dubai Marina / مرسى دبي	22,360	23,651	+5.8% ▲
International City / المدينة العالمية	9,962	9,447	-5.2% ▼
Dubai South (Dubai World Central) / دبي الجنوب (دبي وورلد سنترال)	17,857	16,944	-5.1% ▼
Dubai Creek Harbour / ميناء خور دبي	28,519	27,369	-4.0% ▼
Jebel Ali / جبل علي	19,718	18,936	-4.0% ▼
Dubai Investment Park / مجمع دبي للاستثمار	10,319	9,966	-3.4% ▼
Mohammed Bin Rashid City (MBR City) / مدينة محمد بن راشد (مدينة MBR)	27,968	27,219	-2.7% ▼
International City Phase 2 & 3 / المدينة العالمية - المرحلة 2 و 3	12,559	12,872	+2.5% ▲
Al Furjan / الفرجان	15,345	15,182	-1.1% ▼

BUILDQ2 Where-to-Act · 6 zones

ZONE	Q2 AED/SQM	Q3 AED/SQM	CHANGE
Umm Al Sheif / أم الشيف	17,098	21,639	+26.6% ▲
Al Twar / الطوار	3,163	3,941	+24.6% ▲
Jebel Ali Industrial / جبل علي الصناعية	17,090	13,201	-22.8% ▼
Dubai Islands / جزر دبي	32,187	27,642	-14.1% ▼
Jumeirah Islands / جزر جميرا	31,025	27,205	-12.3% ▼
Palm Jebel Ali / نخلة جبل علي	40,503	36,433	-10.0% ▼

06C · PRICE TRAIL · DUBAI Q1 COHORT

Price Trail

Q1 · Q2 · Q3

Dubai's **Q1 2026** tags from the data pack — **BUY** and **BUILD** in separate tables — tracked through Q2 and Q3. Prices are residential AED/sqm (sale stamps). Δ by Q3 is vs Q1.

21

Q1 BUY

separate table below

8

Q1 BUILD

separate table below

29

FULL TRAIL

Q1·Q2·Q3 priced

-25.3%

BIGGEST Q1→Q3

Jumeirah Beach Residence

EACH TABLE SORTED BY |Q1→Q3 %| · ▲ UP · ▼ DOWN · NAME MARK = |Δ| ≥ 50%

BUY

Dubai Q1 BUY · 21 zones

ZONE	Q1	Q2	Q3	Δ BY Q3
Jumeirah Beach Residence / جميرا بيتش ريزيدنس	31,861	25,378	23,807	-25.3% ▼
Umm Suqeim / أم سقيم	31,106	26,007	23,277	-25.2% ▼
Jumeirah Golf Estates / جميرا غولف إستيتس	24,700	24,327	30,331	+22.8% ▲
Bluewaters Island / جزيرة بلو ووترز	62,376	57,996	48,994	-21.5% ▼
Jumeirah Park / جميرا بارك	26,216	25,827	22,553	-14.0% ▼
Meydan City / مدينة ميدان	33,986	27,934	29,296	-13.8% ▼
Discovery Gardens / ديسكفري جاردنز	10,837	10,251	9,502	-12.3% ▼
Downtown Dubai / وسط مدينة دبي	37,764	38,588	34,268	-9.3% ▼
Jumeirah / جميرا	59,408	44,872	53,951	-9.2% ▼
Al Jadaf / الجداف	22,630	21,407	20,672	-8.7% ▼
Dubai Land / دبي لاند	17,286	16,188	15,823	-8.5% ▼
The Springs and The Meadows / السبرينغز والميدوز	28,366	28,993	26,323	-7.2% ▼
International City / المدينة العالمية	8,837	9,962	9,447	+6.9% ▲
Al Wasl / الوصل	38,078	39,863	35,591	-6.5% ▼

06C · PRICE TRAIL · CONTINUED

Price Trail

Q1 BUY · continued

Remaining Q1 BUY zones — same sale-stamp trail · Δ by Q3 vs Q1.

BUY

Dubai Q1 BUY · 2/2 · 21 zones

ZONE	Q1	Q2	Q3	Δ BY Q3
Dubai South (Dubai World Central) / دبي الجنوب (دبي وورلد سنترال)	15,936	17,857	16,944	+6.3% ▲
Palm Jumeirah / نخلة جميرا	57,867	53,796	60,205	+4.0% ▲
Damac Lagoons / داماك لاجونز	14,675	15,291	14,184	-3.3% ▼
Mohammed Bin Rashid City (MBR City) / مدينة محمد بن راشد (مدينة MBR)	27,953	27,968	27,219	-2.6% ▼
Dubai Maritime City / مدينة دبي الملاحية	33,231	34,264	32,397	-2.5% ▼
Dubai Creek Harbour / ميناء خور دبي	27,689	28,519	27,369	-1.2% ▼
Dubai Production City (IMPZ) / مدينة دبي للإنتاج (IMPZ)	14,002	13,414	13,954	-0.3% ▼

BUILD

Dubai Q1 BUILD · 8 zones

ZONE	Q1	Q2	Q3	Δ BY Q3
Deira / ديرة	10,036	6,892	7,576	-24.5% ▼
The Lakes / البحيرات	33,671	30,813	30,093	-10.6% ▼
Jumeirah Heights / جميرا هاييتس	23,951	23,115	22,064	-7.9% ▼
Dubai Islands / جزر دبي	29,163	32,187	27,642	-5.2% ▼
World Islands / جزر العالم	43,506	41,330	45,221	+3.9% ▲
Al Barsha / البرشاء	14,493	9,294	14,071	-2.9% ▼
Al Sufouh / الصفوح	22,986	23,490	23,576	+2.6% ▲
Palm Jebel Ali / نخلة جبل علي	37,066	40,503	36,433	-1.7% ▼

— = no residential sale stamp that quarter. Δ by Q3 is vs Q1.

07 · ZONE MOVEMENT

What Changed Since Last Quarter

Turns a static score into a story. Q2 → Q3 transitions from the prior engine run. **3** zones newly BUY/BUILD; **19** lost an active signal — high quarterly turnover is expected: tags re-read a trailing price/growth window each quarter. The **2–3 yr BUY horizon is the holding thesis, not a lock on the label** — a zone can flip at the gate while the accumulate thesis still runs.

3	19	3	112
NEW BUY / BUILD	FELL OFF	BUY NOW	PRIOR QUARTER
became active this quarter	lost BUY/BUILD → HOLD/WATCH	0 carried from Q2	2026-Q2 index

NEW THIS QUARTER (HEADLINE)

AREA	NOW	REOS
Al Quoz / القوز	BUY	47.9
Dubai Festival City / مدينة دبي فستيفال	BUY	53.7
Mirdif / مردف	BUILD	59.7

MOMENTUM LEADERS (Δ REOS)

AREA	Δ	NOW
Emirates Hills / تلال الإمارات	+25.6	HOLD
Al Barsha / البرشاء	+24.7	HOLD
Al Sufouh / الصفوح	+22.8	HOLD
The Lakes / البحيرات	+18.2	HOLD
Tilal Al Ghaf / تلال الغاف	+16.9	HOLD
Arabian Ranches Phase 2 / المرافق العربية - المرحلة 2	+16.0	HOLD
Motor City / موتور سيتي	+14.9	HOLD
Dubai Production City (IMPZ) / مدينة دبي للإنتاج (IMPZ)	+14.7	HOLD

TURNOVER ≠ BROKEN HORIZON

BUY's 2–3 year gloss is how long to hold the thesis once you enter. The quarterly tag is a fresh screen on trailing deals — border zones flip often. That is gate sensitivity, not evidence the engine forgot last quarter's call.

08 · BUY ZONES, DETAILED

The Opportunity List

3 BUY zones — accumulate signals. Priced low, momentum only just turning. † = yield at listed AED/sqm (engine sale basis mismatched).

Dubai Festival City / مدينة دبي فستيفال BUY			53.7
opportunity to build a position — prices still soft, upside not yet in (2–3 yr)			
AED / SQM	YIELD	GROWTH	
14,493	6.6%	-9.9%	

Al Quoz / القوز BUY			47.9
opportunity to build a position — prices still soft, upside not yet in (2–3 yr)			
AED / SQM	YIELD	GROWTH	
7,673	9.4%	-3.3%	

Jebel Ali Industrial / جبل علي الصناعية BUY			41.5
opportunity to build a position — prices still soft, upside not yet in (2–3 yr)			
AED / SQM	YIELD	GROWTH	
13,201	—†	-8.0%	

09 · BUILD ZONES, DETAILED

Supply Gate, Zone by Zone

6 headline BUILD zones with a sale price — supply conditions earn the tag . Engine BUILD count is still 6 .

Jumeirah Village Circle /
قرية جميرا الدائرية

71.3

BUILD

supply-led opportunity — follow delivery in the zone (9–15 mo)

AED / SQM	ACTIVE	PIPELINE ×	YIELD
14,264	172	4.39×	6.8%

Elevated pipeline (4.4× trailing sales) with 172 active projects.

Jebel Ali / جبل علي

66.8

BUILD

supply-led opportunity — follow delivery in the zone (9–15 mo)

AED / SQM	ACTIVE	PIPELINE ×	YIELD
18,936	73	5.01×	5.0%

Elevated pipeline (5.0× trailing sales) with 73 active projects.

Al Furjan / الفرجان

61.7

BUILD

supply-led opportunity — follow delivery in the zone (9–15 mo)

AED / SQM	ACTIVE	PIPELINE ×	YIELD
15,182	60	10.40×	—†

Heavy pipeline (10.4× trailing sales) with 60 active projects — watch absorption.

Mirdif / مردف

59.7

BUILD

supply-led opportunity — follow delivery in the zone (9–15 mo)

AED / SQM	ACTIVE	PIPELINE ×	YIELD
9,526	1	2.71×	4.7%

Elevated pipeline (2.7× trailing sales) with 1 active projects.

Dubai Silicon Oasis /
واحة دبي للسيليكون

57.9

BUILD

supply-led opportunity — follow delivery in the zone (9–15 mo)

AED / SQM	ACTIVE	PIPELINE ×	YIELD
12,618	17	3.62×	6.2%

Elevated pipeline (3.6× trailing sales) with 17 active projects.

Dubai Investment Park /
مجمع دبي للاستثمار

55.0

BUILD

supply-led opportunity — follow delivery in the zone (9–15 mo)

AED / SQM	ACTIVE	PIPELINE ×	YIELD
9,966	73	7.76×	5.3%

Elevated pipeline (7.8× trailing sales) with 73 active projects.

HOW TO READ OVERSUPPLY

Pipeline × compares disclosed units to recent residential sales. A high multiple means more stock versus recent trading; **0.0** means no disclosed units. So a high multiple is a glut risk inside a cleared gate; 0.0 is activity without a unit book; a one-project early book is concentration, not citywide momentum. Tags unchanged.

03

Market Depth

Beneath the scores, the registered market itself — deal direction, macro context, the top ranked zones, and off-plan developers.

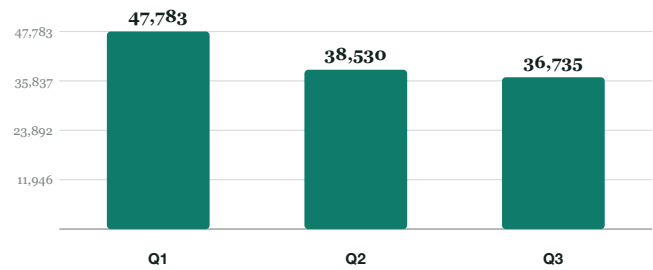
THE MARKET

10 · MARKET DIRECTION

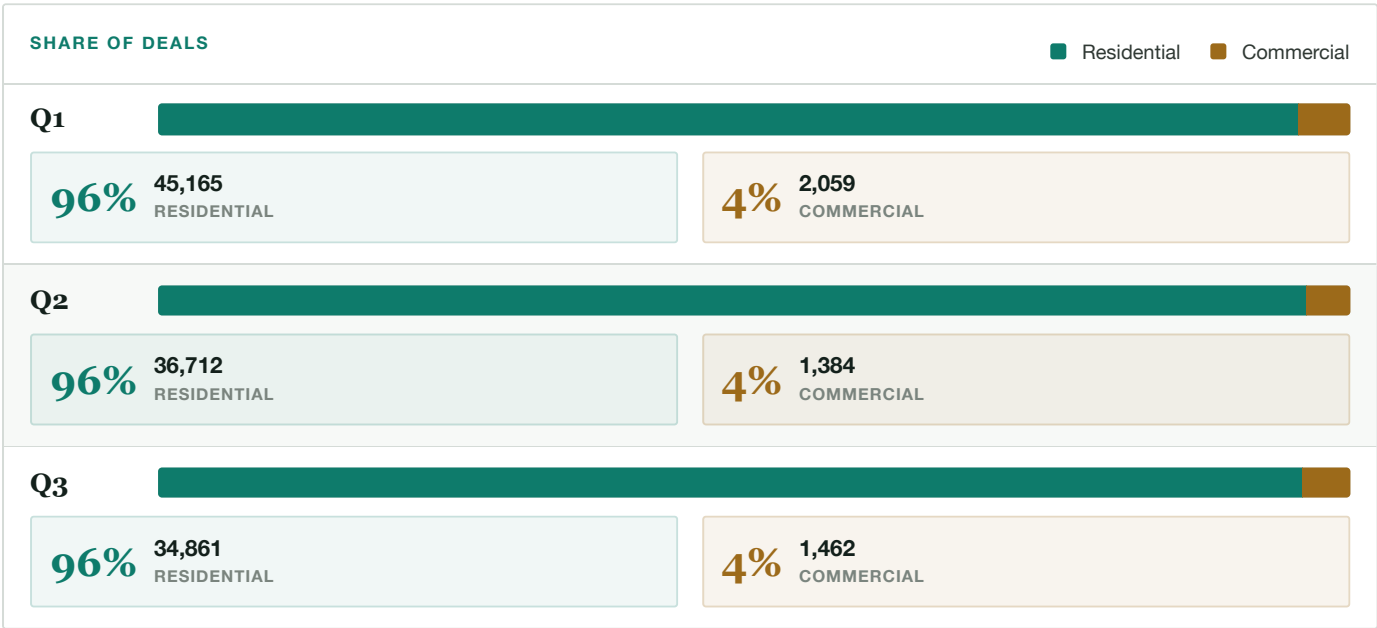
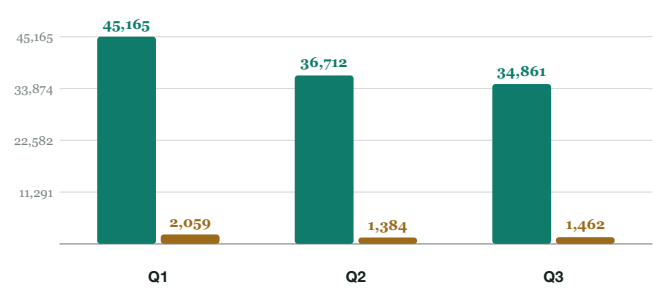
Which Way the Market Turned

From your data — citywide deals Q1 → Q2 → Q3, and the residential vs commercial split. Trailing total = res + com + land + other.

DEAL COUNTS BY QUARTER



RESIDENTIAL VS COMMERCIAL · DEALS



123,048

TRAILING 3Q DEALS
res 116,738 · com 4,905 · land 1,405

36,735

DLD Q3 DEEDS
AED 84.82B

36,735

ZONE-SLICE Q3
sale transactions

5.3%

MEDIAN YIELD
print-safe · † remapped

DIRECTION CALL

By Q3 2026 Dubai has **turned from boom to correction in the mainstream** — ValuStrat -3.1% YoY (apartments -5.3%), monthly transaction value below the 2025 peak, buyers rotating toward completed stock, while **prime still rises**. This is the most BUY-relevant GCC backdrop REOS covers: high liquidity with mainstream prices falling off a top. Separate “cheap because lagging” from “cheap because overbuilt.”

11 · MACRO & REGULATORY · CONTEXT — NOT SCORED

The Backdrop, Never the Score

Dubai macro + Q3 news. Real, attributed, and **never entered into any model, score or tag.**

MACRO DATA BLOCK

MACRO POINT	Q3 2026 VALUE	SOURCE
National framework	Dubai Economic Agenda (D33); "We the UAE 2031"	Gov of Dubai / UAE
Currency peg	AED pegged to USD at 3.6725	CBUAE
CBUAE base rate (ON deposit facility)	~4.15–4.40% (tracks US Fed under the peg; confirm current print)	Central Bank of the UAE
DLD property transfer fee	4% of value (typically split buyer/seller); no annual property tax; no capital-gains tax	Dubai Land Department
Property registration	DLD / Dubai REST; off-plan via Oqood + mandatory escrow (Law 8/2007)	DLD / RERA Dubai
Population (Dubai)	~3.9 million and rising (~ +100k/yr)	Dubai Statistics Center
Foreign ownership	Freehold open to all nationalities in designated areas since 2002 — not zone-restricted like Saudi/Qatar	DLD
Residency-by-investment	UAE Golden Visa: 10-yr at ≥ AED 2M property (freehold); 2-yr investor visa at lower thresholds	ICP / DLD
Rental regulation	RERA rental index / smart calculator caps in-tenancy increases; Ejari mandatory	RERA Dubai

Q3 2026 MARKET NEWS

- **Nine-month (Jan–Sep 2026) transactions AED 574.12B across 165,018 deals** — the second-highest nine-month sales value in Dubai's history — DLD / Emirates 24|7
- Of that, **sales AED 379.4B (123,416 txns)**: ready-built AED 196.08B (39,320), off-plan AED 183.32B (84,090); mortgages AED 151.13B — DLD
- **Nine-month total = ~62.5% of 2025's full-year AED 919B**; monthly pace ~AED 63.8B, **below 2025's ~AED 76.6B/mo** — i.e. still huge, but cooling off the 2025 peak — DLD / Emirates 24|7
- **September 2026: AED 50.78B across 16,490 txns** (+9.9% value, +3.3% volume MoM); sales AED 29.66B — DLD / Truhauz
- **Off-plan still dominant by count** (Sep: 65.4% of deals) but **ready leads by value** (54%) — a flight to completed stock — DLD / Truhauz

Ranked Index — All 78 Scoreable Zones

All 78 scoreable zones (112 districts total; 34 held on WATCH) · ~30/page. † = yield at listed AED/sqm.

#	AREA	REOS	SIGNAL	AED/SQM	YIELD
1	Dubai Marina / مرسى دبي	78.5	HOLD	23,651	5.5%
2	Palm Jumeirah / نخلة جميرا	76.3	HOLD	60,205	3.7%
3	Tilal Al Ghaf / تلال الغاف	74.4	HOLD	22,668	—†
4	Downtown Dubai / وسط مدينة دبي	74.2	HOLD	34,268	5.0%
5	Mohammed Bin Rashid City (MBR City) / مدينة محمد بن راشد (مدينة MBR)	72.2	HOLD	27,219	6.0%
6	Jumeirah Village Circle / قرية جميرا الدائرية	71.3	BUILD	14,264	6.8%
7	Business Bay / الخليج التجاري	70.4	HOLD	26,699	4.7%
8	Motor City / موتور سيتي	70.2	HOLD	16,814	5.3%
9	Arabian Ranches / المزارع العربية	70.0	HOLD	25,892	5.5%
10	Dubai Production City (IMPZ) / مدينة دبي للإنتاج (IMPZ)	69.6	HOLD	13,954	6.8%
11	Dubai Land / دبي لاند	69.5	HOLD	15,823	5.8%
12	Dubai Creek Harbour / ميناء خور دبي	69.5	HOLD	27,369	5.7%
13	Jumeirah Golf Estates / جميرا غولف إستيتس	68.3	HOLD	30,331	—†
14	Emirates Hills / تلال الإمارات	68.0	HOLD	41,491	—†
15	Al Sufouh / الصفوح	67.2	HOLD	23,576	4.6%
16	Jumeirah / جميرا	67.1	HOLD	53,951	2.2%
17	Al Barsha / البرشاء	66.8	HOLD	14,071	—†
18	Jebel Ali / جبل علي	66.8	BUILD	18,936	5.0%
19	Jumeirah Beach Residence / جميرا بيتش ريزيدنس	66.3	HOLD	23,807	5.1%
20	Arabian Ranches Phase 2 / المزارع العربية - المرحلة 2	66.1	HOLD	20,400	—†
21	Dubai Studio City / مدينة دبي للاستوديوهات	65.6	HOLD	17,402	—†
22	Dubai Sports City / مدينة دبي الرياضية	65.0	HOLD	15,442	—†
23	The Springs and The Meadows / السبرينغز والميدوز	64.9	HOLD	26,323	5.5%
24	The Lakes / البحيرات	63.8	HOLD	30,093	5.8%
25	Al Jadaf / الجداف	63.8	HOLD	20,672	4.2%
26	DIFC / مركز دبي المالي العالمي	63.8	HOLD	40,443	3.8%
27	The Greens and The Views / الغرينز والفيوز	63.6	HOLD	19,447	—†
28	Arabian Ranches Phase 3 / المزارع العربية - المرحلة 3	63.0	HOLD	16,873	—†
29	Dubai South (Dubai World Central) / دبي الجنوب (دبي وورلد سنترال)	62.9	HOLD	16,944	5.2%
30	Dubai Industrial City / مدينة دبي الصناعية	62.8	HOLD	14,605	6.4%

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Ranked Index (cont.)

#	AREA	REOS	SIGNAL	AED/SQM	YIELD
31	Dubai Harbour / ميناء دبي	62.4	HOLD	44,920	4.3%
32	Zabeel / زعبيل	62.2	HOLD	36,816	—†
33	Meydan City / مدينة ميدان	61.9	HOLD	29,296	5.3%
34	Al Furjan / الفرجان	61.7	BUILD	15,182	—†
35	Umm Suqeim / أم سقيم	60.1	HOLD	23,277	2.5%
36	Deira / ديرة	60.0	HOLD	7,576	—†
37	Mirdif / مردف	59.7	BUILD	9,526	4.7%
38	Ras Al Khor Industrial / رأس الخور الصناعية	59.2	HOLD	24,728	2.5%
39	Bluewaters Island / جزيرة بلو ووترز	59.1	HOLD	48,994	—†
40	Jumeirah Islands / جزر جميرا	58.2	HOLD	27,205	5.6%
41	Damac Lagoons / داماك لاجونز	58.2	HOLD	14,184	6.2%
42	Tecom Business Park (Al Sufouh) / مجمع تيكوم التجاري (الصفوح)	57.9	HOLD	27,334	2.4%
43	Jumeirah Lake Towers / أبراج بحيرات جميرا	57.9	HOLD	17,997	—†
44	Dubai Silicon Oasis / واحة دبي للسيليكون	57.9	BUILD	12,618	6.2%
45	Culture Village / قرية الثقافة	57.4	HOLD	19,571	5.0%
46	Dubai Maritime City / مدينة دبي للملاحة	57.2	HOLD	32,397	2.6%
47	Al Wasl / الوصل	56.6	HOLD	35,591	2.8%
48	Jumeirah Village Triangle / قرية جميرا المثلثة	56.2	HOLD	17,335	5.7%
49	Nad Al Shiba / ند الشبا	55.6	HOLD	22,488	3.7%
50	Barsha Heights / برشا هايتس	55.2	HOLD	15,982	5.3%
51	Dubai Investment Park / مجمع دبي للاستثمار	55.0	BUILD	9,966	5.3%
52	Palm Jebel Ali / نخلة جبل علي	54.8	HOLD	36,433	—
53	Jumeirah Park / جميرا بارك	54.6	HOLD	22,553	5.8%
54	International City / المدينة العالمية	54.1	HOLD	9,447	—†
55	Trade Center (SZR) / مركز التجارة (شارع الشيخ زايد)	53.9	HOLD	34,148	2.3%
56	Dubai Festival City / مدينة دبي فستیفال	53.7	BUY	14,493	6.6%
57	Dubai Science Park (Dubitech) / حديقة دبي العلمية (ديبوتك)	53.4	HOLD	17,373	—†
58	Green Community (DIP) / المجتمع الأخضر (DIP)	53.4	HOLD	15,170	—†
59	International City Phase 2 & 3 / المرحلة 2 و 3	53.3	HOLD	12,872	6.8%
60	Nad Al Hamar / ند الحمير	52.6	HOLD	11,544	—†

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Ranked Index (cont.)

#	AREA	REOS	SIGNAL	AED/SQM	YIELD
61	Bur Dubai / بر دبي	52.4	HOLD	21,656	3.3%
62	Discovery Gardens / ديسكفري جاردنز	52.1	HOLD	9,502	—†
63	Al Qusais Industrial / القصيص الصناعية	49.6	HOLD	7,038	8.4%
64	Dubai Islands / جزر دبي	49.5	HOLD	27,642	3.5%
65	Muhaisanah / محيصنة	49.0	HOLD	9,860	5.2%
66	Al Twar / الطوار	48.4	HOLD	3,941	—
67	The Hills / ذا هيلز	48.2	HOLD	29,461	—†
68	Al Quoz / القوز	47.9	BUY	7,673	9.4%
69	Al Warsan / الورسان	47.8	HOLD	2,837	—
70	Al Mizhar / المزهر	47.8	HOLD	5,843	5.8%
71	Dubai Healthcare City Phase 2 / مدينة دبي الطبية - المرحلة 2	45.4	HOLD	18,207	—†
72	Al Rashidiya / الراشدية	45.2	HOLD	3,414	13.5%
73	Jumeirah Bay Island / جزيرة جميرا باي	43.8	HOLD	76,680	3.7%
74	Jumeirah Heights / جميرا هايتس	42.9	HOLD	22,064	4.4%
75	Umm Al Sheif / أم الشيف	42.5	HOLD	21,639	4.4%
76	Jebel Ali Industrial / جبل علي الصناعية	41.5	BUY	13,201	—†
77	World Islands / جزر العالم	36.8	HOLD	45,221	—
78	Dubai Waterfront / واجهة دبي البحرية	27.8	HOLD	7,186	6.2%

Deepest Pipelines

Zone pipeline from the district supply profile, plus the compiled off-plan book (2,527 disclosed off-plan projects in Dubai).

2,527

OFF-PLAN PROJECTS
compiled, not a registry

2,363

UNDER CONSTRUCTION
active book

1,448,114

UNITS DISCLOSED
where a source reports units

63

ZONES WITH PIPELINE
district supply book

AREA	PIPELINE UNITS	SIGNAL
Dubai Land / دبي لاند	252,143	HOLD
Dubai South (Dubai World Central) / دبي الجنوب (دبي وورلد سنترال)	123,660	HOLD
Meydan City / مدينة ميدان	122,850	HOLD
Dubai Islands / جزر دبي	89,184	HOLD
Damac Lagoons / داماك لاجونز	82,204	HOLD
Jumeirah Lake Towers / أبراج بحيرات جميرا	57,632	HOLD
Business Bay / الخليج التجاري	53,356	HOLD
Jumeirah Village Circle / قرية جميرا الدائرية	52,316	BUILD
Dubai Investment Park / مجمع دبي للاستثمار	45,876	BUILD
Jebel Ali / جبل علي	37,355	BUILD
Dubai Maritime City / مدينة دبي الملاحية	36,084	HOLD
The Hills / ذا هيلز	35,510	HOLD
Jumeirah Islands / جزر جميرا	33,388	HOLD
Dubai Sports City / مدينة دبي الرياضية	32,342	HOLD
Al Furjan / الفرجان	29,327	BUILD
Dubai Creek Harbour / ميناء خور دبي	25,947	HOLD

SOURCE

Zone units from the district supply profile. Project book compiled from developer sites and press; off-plan registrations in Dubai run through DLD Oqood.

14 · DEVELOPERS & PROJECTS

Who Is Building

Active off-plan developers and largest disclosed projects in the compiled Dubai off-plan book. Ranked by disclosed units, then project count — context for BUILD, not a score input rewrite.

TOP DEVELOPERS BY DISCLOSED PIPELINE UNITS

DEVELOPER	PROJECTS	UNITS	FOCUS DISTRICTS
Damac Properties	172	190,961	Al Wasl, Business Bay, Damac Lagoons
Emaar Properties PJSC	232	165,125	Al Yufrah, Arabian Ranches, Arabian Ranches Phase 3
Azizi Developments	98	85,692	Al Furjan, Al Jadaf, Dubai Islands
Binghatti Holding Limited	65	73,332	Al Jadaf, Business Bay, Culture Village
Sobha Real Estate L.L.C	64	54,497	Business Bay, Dubai Harbour, Dubai Land
Ellington Properties Development L.L.C	59	49,034	Bur Dubai, Business Bay, Culture Village
Nshama - Nshama Properties	30	40,603	Downtown Dubai, Dubai Land
Danube Properties	25	28,764	Al Furjan, Al Sufouh, Business Bay
Wasl Properties	50	27,242	Business Bay, Jebel Ali, Jumeirah Golf Estates

LARGEST PROJECTS BY UNITS

PROJECT	DEVELOPER	DISTRICT	UNITS	% DONE	STATUS
Golf Views Seven City - Seven City JLT	Seven Tides International	Jumeirah Lake Towers / أبراج بحيرات جميرا	5,631	28	under construction
Diamondz By Danube	Danube Properties	Jumeirah Lake Towers / أبراج بحيرات جميرا	4,229	16	under construction
Mercedes Benz Places Binghatti City Tower 8 - AMG Vision Tower A	Binghatti Holding Limited	Meydan City / مدينة ميدان	3,871	0	under construction
Marriott Residences JLT	SABA Properties JLT	Jumeirah Lake Towers / أبراج بحيرات جميرا	3,778	30	under construction
Verde by Sobha	Sobha Real Estate L.L.C	Jumeirah Lake Towers / أبراج بحيرات جميرا	3,666	85	under construction
Viewz 1 By Danube	Danube Properties	Jumeirah Lake Towers / أبراج بحيرات جميرا	3,579	50	under construction
Viewz 2 By Danube	Danube Properties	Jumeirah Lake Towers / أبراج بحيرات جميرا	3,574	50	under construction
Wind Towers 1	HABN Real Estate Development	Jumeirah Lake Towers / أبراج بحيرات جميرا	3,510	75	under construction

15 · FORWARD OUTLOOK & CONFIDENCE

The Reading, and How Firm

What happens next — and how sure REOS is. Every figure below is a **range**, not a point: a price path from recent residential AED/sqm, then a **±39%** confidence band. Shown for actionable full-coverage zones (3/3 BUY this edition). Dubai bands are provisional — no Dubai-only back-test yet.

±39%

BASE-CASE BAND

confidence range

3

BUY WITH BANDS

of 3 BUY

FULL

GETS 3/5/10 + IRR

full coverage only

78

FULL ZONES

of 112 citywide

EXHIBIT — FORWARD BANDS · BUY + BUILD

AREA	SIGNAL	TIER	3-YR	5-YR	10-YR	IRR 10Y
Dubai Festival City / مدينة دبي فستيفال	BUY	FULL	-37%...43%	-31%...57%	-2%...124%	4.9%
Al Quoz / القوز	BUY	FULL	-45%...26%	-43%...31%	-24%...73%	2.2%
Jebel Ali Industrial / جبل علي الصناعية	BUY	FULL	-51%...13%	-53%...7%	-44%...27%	-0.9%
Jumeirah Village Circle / قرية جميرا الدائرية	BUILD	FULL	-40%...37%	-36%...47%	-10%...104%	3.9%
Jebel Ali / جبل علي	BUILD	FULL	-46%...24%	-44%...27%	-27%...67%	1.8%
Al Furjan / الفرجان	BUILD	FULL	-39%...38%	-35%...48%	-9%...107%	4.1%
Mirdif / مردف	BUILD	FULL	-51%...12%	-57%...-3%	-57%...-2%	-3.4%
Dubai Silicon Oasis / واحة دبي للسيليكون	BUILD	FULL	-50%...14%	-52%...10%	-41%...33%	-0.4%
Dubai Investment Park / مجمع دبي للاستثمار	BUILD	FULL	-51%...12%	-58%...-3%	-64%...-19%	-5.3%

HOW TO READ THE BAND

Each band is a price-path range, not a yield forecast. IRR is capital-only. Thin-deal zones can swing hard quarter to quarter — a BUY tag can sit beside a soft near-term band without contradiction. Low-coverage zones stay withheld.

Built to Survive Due Diligence

WHAT THIS IS

Market intelligence, for information only — not a RICS / IVS Red Book valuation, not investment advice, not an offer.

WHAT FEEDS THE SCORE

Registered DLD sale deeds, zone-level rent contracts, and a compiled off-plan supply book. Macro and news are context only — never scored.

THE RULES THIS EDITION FOLLOWS

RULE	HOW ENFORCED
Tags from engine only	Read from the signal — never re-derived at render
Yield	Official rent ÷ sale price; 15% hard cap. Print † when engine sale basis ≠ listed AED/sqm (or price-band fail) — then show rent ÷ listed price. Tags untouched.
Forward projections	Forward-Metrics v3 on zone-pack validation-history prices; FULL-tier 3/5/10 + IRR; else withheld with reason
Macro & news	Shown as context — never enters a score or tag
Property classes	Dubai carries 3 classes (Residential / Commercial / Land) — not collapsed to a 2-class read; live tagging is Residential-scored
Foreign-investment zones	Dubai has no scored foreign-transaction dataset for this edition — the freehold/usufruct framework is carried as a one-line macro-context row only, not a transaction-level chapter; not implied to be absent
Ranked index	All 78 scoreable zones printed (112 districts total); the full ranking is held in the underlying records
District names	English from the REOS profile; Arabic from the same zone record — printed as English / Arabic. Tags and scores untouched.
Satellite indices	REOS provides 7 zone-level indices per report from ESA Copernicus satellite data — a REOS capability, separate from this edition's registry-based scores and tags

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DUBAI · UAE · Q3 2026

The Market Has More Than One Direction.

Dubai is a city of distinct micro-markets — freehold waterfronts built for capital (Palm Jumeirah, Dubai Marina, Dubai Harbour), an established core (Downtown, DIFC, Business Bay), and value corridors further inland — each on its own supply and pricing cycle, not one citywide curve.

Across 112 districts in the emirate of Dubai, REOS brings government-registered transactions, rental behaviour, supply conditions and deterministic market intelligence into one consistent view of how each district is behaving.

The result is not another citywide average.

It is a clearer view of where Dubai is stabilizing, where pressure is building, and where the next opportunity may be taking shape.

REOS — ALTCTRL INTELLIGENCE

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