

FLASH REPORT

► JUNE | Condo & HDB
2026 Rental Market

99 GROUP

*Based on numbers compiled on 15th July 2026.

*The term 'Condo' as used herein the report includes non-landed private condominium and apartment units.

Observations

Condo Rental Prices and Transaction Volumes Rebound in June 2026

A. Condo Rental Market

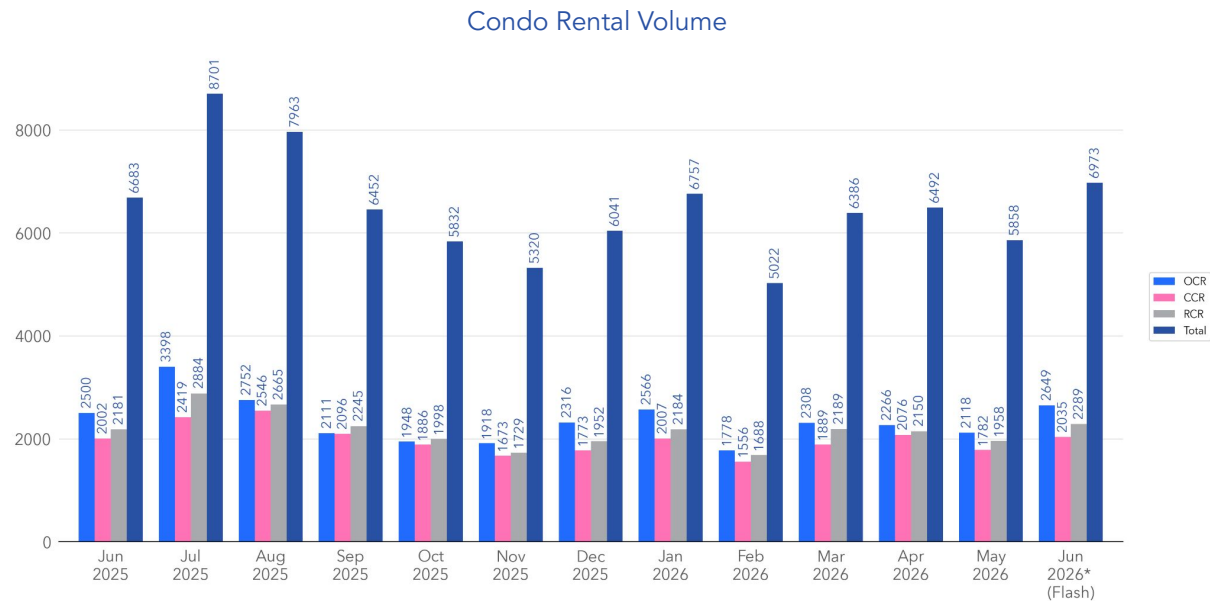
1. In June 2026, overall condo rental prices increased by 0.3% month-on-month. Prices in RCR and OCR increased by 0.9% and 0.8%, respectively, while CCR decreased by 1% compared to May 2026.
 - Year-on-year, overall rental prices increased by 2.4% compared to June 2025.
 - Year-on-year, rental prices in CCR, RCR, and OCR increased by 2.5%, 2.5%, and 2%, respectively.
2. Rental volumes increased by 19% month-on-month. An estimated 6,973 units were rented in June 2026, compared to 5,858 in May 2026.
 - Year-on-year, rental volumes were 4.3% higher.
 - Rental volumes were 10.1% higher than the 5-year average for June.
 - Breaking it down by region for June 2026, 38% of the total rental volume was from OCR, 32.8% from RCR, and 29.2% from CCR.

B. HDB Rental Market

1. In June 2026, HDB rental prices increased by 0.6% compared to May 2026. Rental prices in Mature and Non-Mature estates increased by 0.7% and 0.4%, respectively. Rental prices for 3-room, 5-room units, and Executive flats units increased by 0.7%, 0.6%, and 1.2%, respectively, while 4-room units decreased by 0.1%.
 - Overall rental prices increased by 1.4% compared to June 2025.
 - Year-on-year, rental prices in both Mature and Non-Mature Estates increased by 1.8% and 0.9%, respectively.
 - Year-on-year, rental prices for 3-room, 4-room, 5-room, and Executive flats increased by 1.6%, 1.1%, 1.5%, and 0.6%, respectively.
2. Rental volumes increased by 4.8% month-on-month. An estimated 2,725 HDB flats were rented in June 2026, compared to 2,601 in May 2026.
 - Year-on-year, rental volumes increased by 0.1% compared to June 2025.
 - Rental volumes were 4.1% lower than the 5-year average for June.
 - In June 2026, 4-room flats made up the largest share of rental volume at 38.8%, followed by 3-room flats at 31.8%, 5-room flats at 23.7%, and Executive flats at 5.7%.

Condo Rental Market

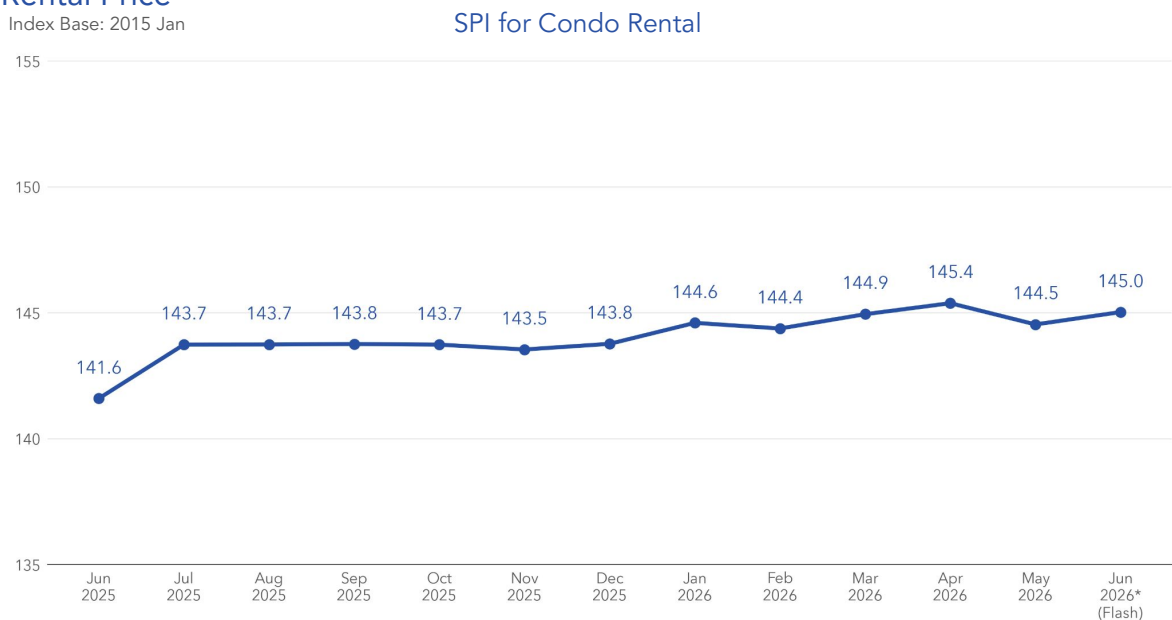
Rental Volume



Note: Latest month figures are flash estimates based on past transaction trends. Volumes will be adjusted for accuracy in subsequent months' flash reports as more transactions are confirmed and recorded.

Rental Price

Index Base: 2015 Jan



2026 June Condo Rental Index	145
2026 May Condo Rental Index	144.5
Change (Month-on-Month)	0.3%

Note: Percentage change is calculated from non-rounded values. All values are rounded to one decimal point thereafter.

Source: 99-SRX / URA

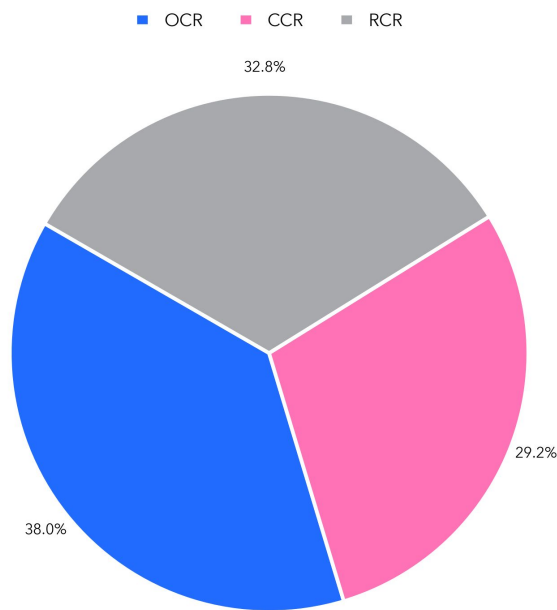
SPI by Region

Month	All Condo		Core Central Region		Rest of Central Region		Outside Central Region	
	Index Value	Monthly Change	Index Value	Monthly Change	Index Value	Monthly Change	Index Value	Monthly Change
Jun 2025	141.6	-0.2%	141.7	-0.6%	138.7	-0.6%	140.9	0.2%
Jul 2025	143.7	1.5%	142.6	0.6%	140.3	1.2%	143.8	2.0%
Aug 2025	143.7	0.0%	143.1	0.4%	141.4	0.7%	143.6	-0.1%
Sep 2025	143.8	0.0%	144.2	0.8%	141.4	-0.0%	142.9	-0.5%
Oct 2025	143.7	-0.0%	143.9	-0.2%	142.1	0.5%	142.1	-0.6%
Nov 2025	143.5	-0.1%	142.9	-0.7%	141.7	-0.3%	142.4	0.2%
Dec 2025	143.8	0.2%	143.0	0.1%	141.6	-0.1%	142.6	0.2%
Jan 2026	144.6	0.6%	143.5	0.3%	141.6	0.0%	144.0	1.0%
Feb 2026	144.4	-0.2%	144.7	0.8%	140.8	-0.5%	143.4	-0.4%
Mar 2026	144.9	0.4%	145.3	0.4%	142.4	1.1%	143.1	-0.3%
Apr 2026	145.4	0.3%	147.3	1.4%	141.8	-0.4%	144.0	0.7%
May 2026	144.5	-0.6%	146.6	-0.4%	140.9	-0.6%	142.6	-1.0%
Jun 2026*	145.0	0.3%	145.2	-1.0%	142.1	0.9%	143.7	0.8%

Note: Latest month figures are flash estimates. Percentage changes are calculated based on actual index number with more decimal places shown in the report.

Source: 99-SRX / URA

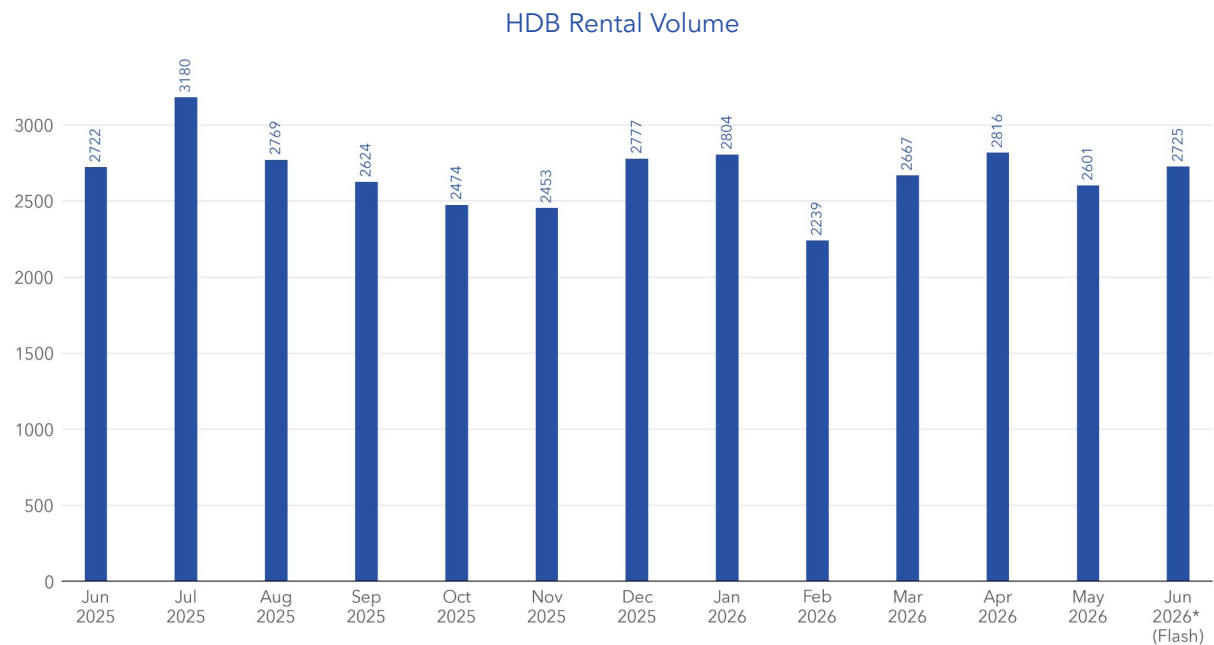
Volume Breakdown by Region in the Month



Source: 99-SRX

HDB Rental Market

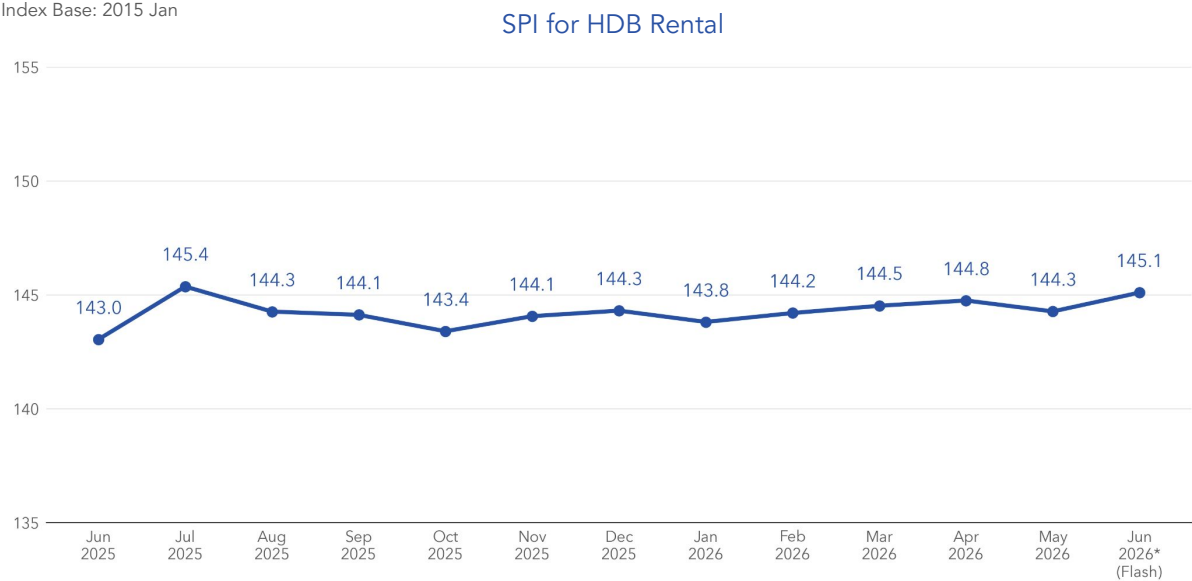
Rental Volume



Note: Latest month figures are flash estimates based on past transaction trends. Volumes will be adjusted for accuracy in subsequent months' flash reports as more transactions are confirmed and recorded.

Rental Price

Index Base: 2015 Jan



2026 June HDB Rental Index	145.1
2026 May HDB Rental Index	144.3
Change (Month-on-Month)	0.6%

Note: Percentage change is calculated from non-rounded values. All values are rounded to one decimal point thereafter.
Source: 99-SRX / HDB

Median HDB Rent (\$)

Town	HDB 3 Rooms	HDB 4 Rooms	HDB 5 Rooms	HDB Executive	Overall
Ang Mo Kio	2,800	3,500	3,900	4,000	3,100
Bedok	2,800	3,500	3,800	4,350	3,100
Bishan	3,100	3,700	4,025	4,800	3,700
Bukit Batok	2,800	3,400	3,550	3,700	3,300
Bukit Merah	3,000	4,000	4,500	-	3,800
Bukit Panjang	2,600	3,150	3,350	3,550	3,200
Bukit Timah	3,075	3,500	4,590	-	3,500
Central Area	3,300	4,500	5,200	-	3,750
Choa Chu Kang	2,625	3,100	3,300	3,550	3,200
Clementi	3,050	3,950	4,400	-	3,425
Geylang	2,800	3,750	4,050	4,550	3,250
Hougang	2,825	3,200	3,500	3,600	3,200
Jurong East	2,875	3,500	3,800	4,425	3,300
Jurong West	2,725	3,400	3,800	4,000	3,500
Kallang/Whampoa	3,050	3,800	4,250	4,550	3,500
Marine Parade	3,100	3,500	4,200	-	3,300
Pasir Ris	1,900	3,400	3,600	3,800	3,500
Punggol	2,850	3,300	3,300	3,200	3,300
Queenstown	3,100	4,100	4,500	5,200	3,450
Sembawang	2,700	3,200	3,300	3,500	3,300
Sengkang	2,850	3,200	3,400	3,500	3,300
Serangoon	2,900	3,400	3,750	4,700	3,400
Tampines	2,800	3,500	3,700	4,000	3,500
Toa Payoh	3,000	3,675	4,100	4,500	3,200
Woodlands	2,500	3,100	3,400	3,400	3,200
Yishun	2,800	3,200	3,500	3,900	3,100
Overall	2,900	3,400	3,600	3,900	3,300

Note: Grey fields contain figures derived from fewer than 10 transactions. Blue fields contain figures derived from only 1 transaction.

SPI by Flat Type

Month	HDB (All Types)		HDB 3 Room		HDB 4 Room		HDB 5 Room		HDB Executive	
	Index Value	Monthly Change	Index Value	Monthly Change	Index Value	Monthly Change	Index Value	Monthly Change	Index Value	Monthly Change
Jun 2025	143.0	0.3%	140.3	0.1%	143.6	0.2%	142.7	-0.1%	144.3	1.3%
Jul 2025	145.4	1.6%	142.1	1.3%	146.6	2.0%	144.1	1.0%	146.7	1.7%
Aug 2025	144.3	-0.8%	141.3	-0.6%	144.8	-1.2%	144.3	0.1%	145.6	-0.8%
Sep 2025	144.1	-0.1%	142.1	0.6%	144.7	-0.1%	143.8	-0.3%	141.3	-2.9%
Oct 2025	143.4	-0.5%	140.3	-1.3%	144.7	-0.0%	142.7	-0.7%	145.1	2.7%
Nov 2025	144.1	0.5%	142.3	1.4%	144.8	0.1%	142.6	-0.1%	142.5	-1.8%
Dec 2025	144.3	0.2%	142.1	-0.1%	144.9	0.1%	143.2	0.4%	144.4	1.4%
Jan 2026	143.8	-0.3%	141.4	-0.5%	144.4	-0.3%	143.2	0.0%	141.8	-1.8%
Feb 2026	144.2	0.3%	141.8	0.3%	145.2	0.6%	142.7	-0.4%	144.3	1.7%
Mar 2026	144.5	0.2%	142.8	0.7%	145.2	-0.0%	143.7	0.7%	142.1	-1.5%
Apr 2026	144.8	0.2%	142.8	0.0%	145.3	0.1%	143.4	-0.3%	145.8	2.5%
May 2026	144.3	-0.3%	141.6	-0.8%	145.4	0.1%	143.9	0.4%	143.4	-1.6%
Jun 2026*	145.1	0.6%	142.6	0.7%	145.2	-0.1%	144.8	0.6%	145.2	1.2%

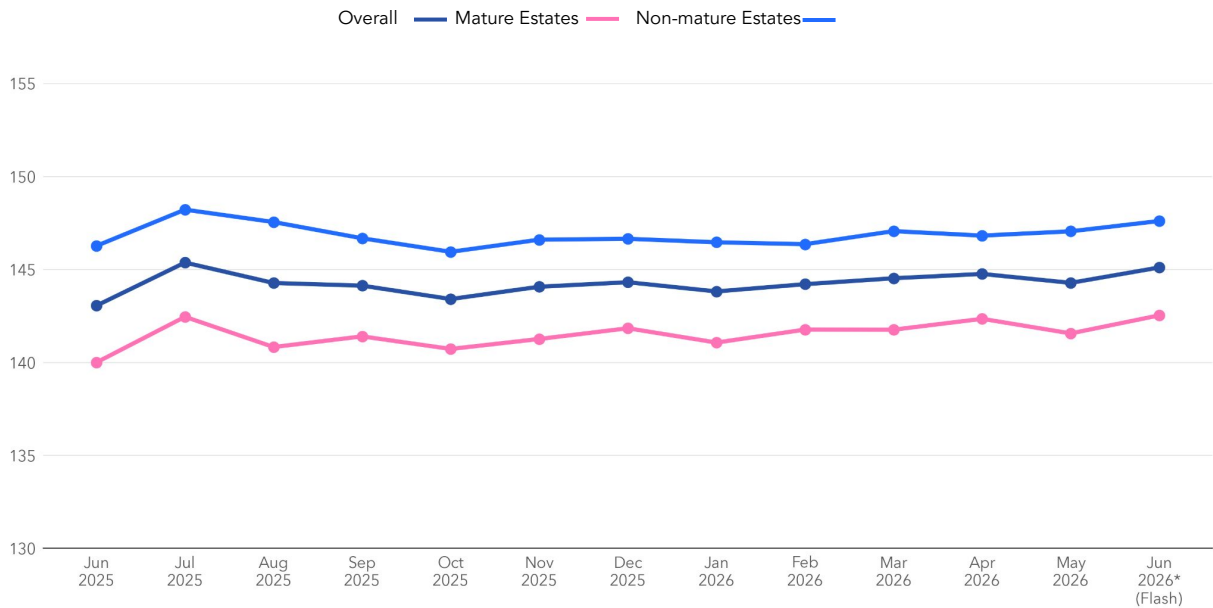
Note: Latest month figures are flash estimates. Percentage changes are calculated based on actual index number with more decimal places shown in the report.

Source: 99-SRX

Mature and Non-Mature Estates

Index Base: 2015 Jan

SPI for HDB Rental in Mature and Non-Mature Estates^



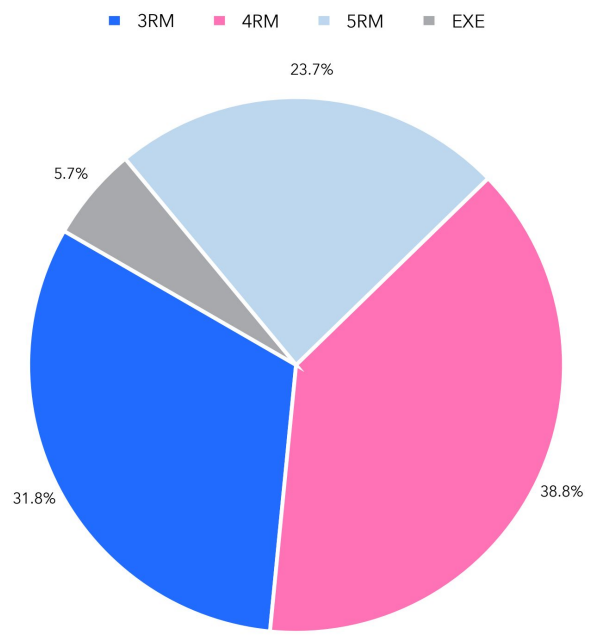
^ Non-Mature Estates (as defined by HDB): Bukit Batok, Bukit Panjang, Choa Chu Kang, Hougang, Jurong East, Jurong West, Punggol, Sembawang, Sengkang, Woodlands and Yishun.

Month	Overall		Mature Estates		Non-mature Estates	
	Index Value	Monthly Change	Index Value	Monthly Change	Index Value	Monthly Change
Jun 2025	143.0	0.3%	140.0	-0.1%	146.3	0.8%
Jul 2025	145.4	1.6%	142.5	1.8%	148.2	1.3%
Aug 2025	144.3	-0.8%	140.8	-1.1%	147.5	-0.4%
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Source: 99-SRX

Volume Breakdown by Room Type in the Month



Source: 99-SRX

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