

## Market Value Index

Market intelligence · 1 July 2026

MARBELLA

## MARKET VALUE INDEX

## Marbella

Prime liquidity hub. High-net-worth demand remains decoupled from global rate hikes.

<b>MEDIAN ASKING</b> <b>€1,695,000</b> <small>MLS active listings</small>	<b>YOY TREND</b> <b>-37.5%</b> <b>MONITOR</b>	<b>MEDIAN DAYS ON MARKET</b> <b>138d</b> <b>SLOW</b>	<b>VERIFIED €/M<sup>2</sup></b> <b>€4,582</b> <small>Notarial register · vs €6,684 asking</small>
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## Asking-Price Reality - Marbella

€ Where this market actually sits versus its asking-price headline.

Notarial-verified · Marbella

## What's driving this valuation

- Asking sits 45.9% above the verified notarial level. That gap is the main thing to bridge in negotiation.
- Asking prices in this segment have softened 42.5% in the last 30 days.
- 20% of comparable listings have already cut their price, a real sign of seller pressure here.

## Verified Market Reality

Notarial register · 3,997 verified sales in Marbella over the last 12 months

This is the verified notarial register figure - actual recorded sale prices, which sit below asking-price estimates by design. It is the floor a valuation can be defended on, not a market asking price.

**PropertyList network · median achieved sale €489,000 (0.0% vs ask)**

Based on 6 verified sales that PropertyList agencies closed in this exact segment over the last 12 months - segment-specific evidence the notarial register can't offer at this granularity.

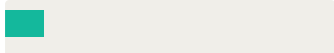
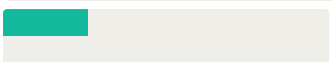


<b>VERIFIED €/M<sup>2</sup></b> <b>€4,582/m<sup>2</sup></b> <small>What buyers have actually paid</small>	<b>SEGMENT ASKING €/M<sup>2</sup></b> <b>€6,684/m<sup>2</sup></b> <small>Where sellers are positioning today</small>
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**Asking premium** Asking prices in this segment sit 45.9% above the notarial verified-sale level - that's the gap a vendor's pricing has to negotiate through.

Notarial figure is municipality-wide for this property class. The asking-to-verified gap reflects both market positioning and the structural difference between asking prices (today's seller positions) and closed sales (negotiated outcomes).

<b>PRICE-CHANGED</b> <b>19.8%</b> <b>MONITOR</b> <small>A meaningful share of sellers have reduced - negotiating room exists.</small>	<b>RECENT VS YEARLY TREND</b> <b>-42.5%</b> <small>Recent median versus the trailing 12-month baseline.</small>	<b>MEDIAN DAYS ON MARKET</b> <b>138d</b> <b>SLOW</b> <small>Slow-moving segment. Buyers have time; precise pricing beats chasing speed.</small>
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## Asking-price quartile spread

Lower quarter		€750,000
Midpoint		€1,695,000
Upper quarter		€3,980,000
Top 10%		€6,450,000

### How to read this

<b>Price-changed</b>	>35% = sellers conceding; <15% = buyers paying close to ask.
<b>Recent vs yearly trend</b>	Direction of recent median vs long-run baseline.
<b>DOM</b>	<60d signals liquidity; >120d signals overpricing.

## Asking-price strategy

<b>Conservative - fast sale</b>	€1,199,000 - €1,475,000	Price between the 40th and 45th percentile of the segment to clear at or below the median days-on-market.
<b>Target - typical days on market</b>	€1,695,000	Price at the segment median - expect to sell around the typical days-on-market.
<b>Aggressive - patient vendor</b>	€1,995,000 - €3,500,000	Price between the 55th and 70th percentile (capped at the 75th) - accept a longer marketing window.

Asking-price bands derived from the segment's price distribution - three positioning options with their typical trade-offs, not a property valuation.

Based on how fast similar stock is clearing, expect roughly 12 weeks at a keen ask, 20 at target, and 34 at an aggressive price.

## Asking vs achieved

### MEDIAN ACHIEVED SALE PRICE

**€489,000**

6 verified sales recorded in this segment over 12 months.

### LIST-TO-SALE GAP

**+0.0%**

Typical movement from asking price to achieved sale price, paired per property.

**Thin sample** Built on 6 recorded sales - a directional signal, not a benchmark. Present it to a client with that qualification, never as a hard market figure.

## Pricing strategy

**SOFT MARKET** A high share of listings are conceding and stock is slow to clear - pricing leverage sits with the buyer.

<b>Launch</b>	Pricing at or just below the segment median leads the market down rather than following it, making the listing the obvious-value choice from day one.
<b>First 30 days</b>	In a conceding market the first three weeks bring the strongest interest the listing will see - an early offer is worth treating as a serious one.
<b>Reduction trigger</b>	A reduction date set at launch, before emotion sets in, avoids a stale asking price compounding weekly while other sellers cut.

## ASKING-PRICE SPREAD

The P25 asking price is €750,000, while the P90 reaches €6,450,000. This wide spread indicates a diverse market, with a significant concentration of listings in the trophy segment. The difference between the P50 (€1,695,000) and P75 (€3,980,000) shows a substantial price jump, suggesting a clear distinction between mass-market and higher-end offerings. This requires precise targeting for any acquisition strategy.

## REDUCTION SIGNAL

19.8% of the 912 listings have undergone at least one price update. This figure indicates that nearly one-fifth of sellers are adjusting their expectations. This suggests a notable degree of seller pressure in the current

market. Buyers should view this as an opportunity for negotiation, as a material portion of vendors are demonstrating flexibility.

### **DRIFT & VERDICT**

The recent 30-day asking median has fallen by 42.5% compared to the trailing 12-month median. This significant downward drift signals a rapid recalibration of seller expectations. This market movement suggests a clear shift in pricing power. Buyer leverage, implying aggressive negotiation is warranted.

### **VERIFIED-MARKET READ**

The notarial register shows a verified market price of €4,582/m<sup>2</sup> from 3,997 closed sales. The current median asking price of €6,684/m<sup>2</sup> sits 45.9% above this verified figure. This substantial gap indicates that vendors are currently overestimating market value. Given the limited PropertyList network data (n=6), the notarial aggregate remains the primary benchmark. Buyers have significant room to negotiate below asking prices, mitigating acquisition risk.

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Source badges show each section's strongest basis: Notarial-verified (Spanish notarial register), Network closed sales (PropertyList recorded deals), Comparable evidence (scored MLS comparables), Asking-price (listing data only).

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