

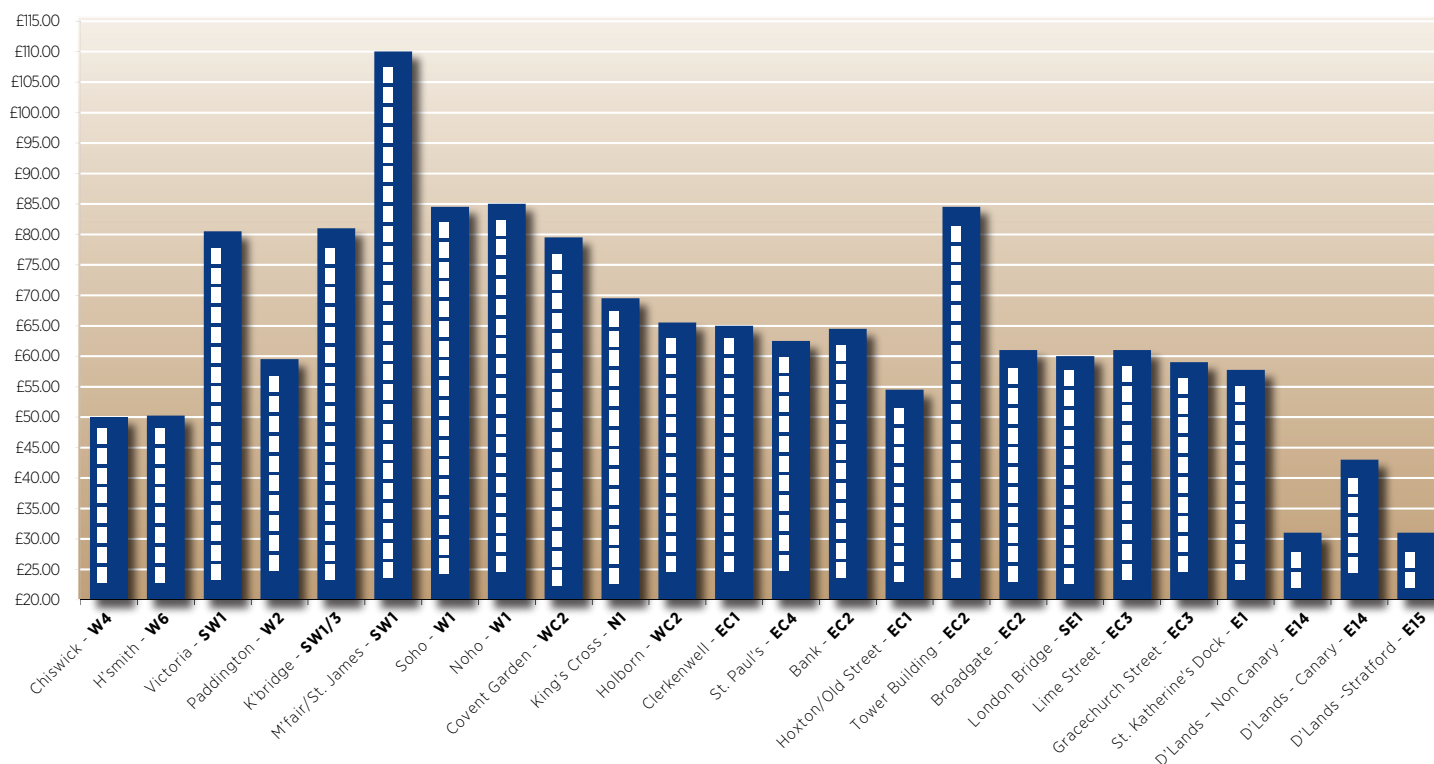
## Rental Index - Q2: 2017 Central London: Grade A

### Summary

- Market easing following rates rise and snap General Election on 8th June
- Impact of Brexit: market still adjusting but settling
- Annual drop across central London: 2.63% (to Q2/2017)
- Quarterly trend
  - **Central London:** dropped by 1.74%
  - **City Core:** dropped by 1.75%
  - **City Fringe North:** dropped by 1.07%
  - **West End:** dropped by 1.23%

### Headline Rent

(per sq ft per annum exclusive)



Compiled by Matthews & Goodman Market Watch Unit

### Definitions:

- **City:** St. Paul's (EC4); Bank (EC2); Tower Build. (EC2); Broadgate (EC2); Lime Street (EC3); Gracechurch St. (EC3)
- **City Fringe North:** Holborn (WC2); Clerkenwell (EC1); Hoxton/Old Street (EC1)
- **West End:** Knightsbridge (SW1/3); Mayfair/St. James (SW1); Soho (W1); Noho (W1); Covent Garden (WC2)

### For more information



#### City

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#### West End

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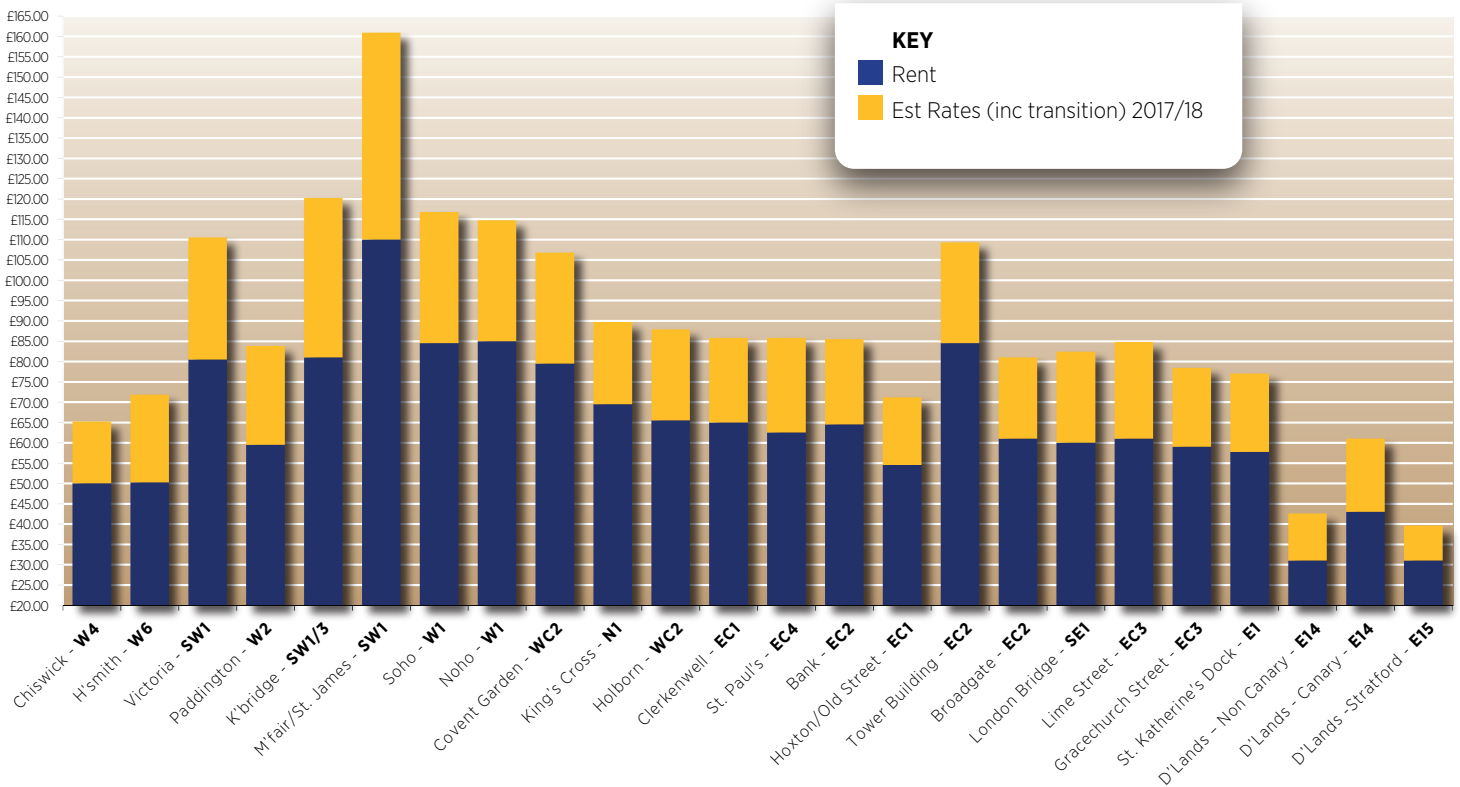
## Rates Payable & Rent Free Periods Central London: Grade A

### Summary

- Average rates payable to April 2018 (estimated)
  - **Central London:** £23.45 per sq ft
  - **City Core:** £22.05 per sq ft
  - **City Fringe:** £19.97 per sq ft
  - **West End:** £35.88 per sq ft

### Headline Rent / Rates

(per sq ft per annum exclusive)



Compiled by Matthews & Goodman Market Watch Unit

#### Note:

- This information is based on assumptions made for the period YC April 2017-March 2018
- Macro economic assumptions:
  - Annual inflation 2%
  - UBR 47.9p (incl small business supplement)
  - Crossrail supplement 2p
  - City of London Security Levy 0.5p
  - Transition cap 'large, upward' (42%)

## For more information



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