OPPORTUNITY SPOTLIGHT · JUNE 2026

Dubai Islands: The Investment Case

Five islands, more than 20 km of new public beaches, a government-backed bridge to the mainland in 2026, and entry pricing that has not yet repriced for the waterfront premium it will command.

An institutional breakdown of the case, with the Dubai and global waterfront precedents that frame it.

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EXECUTIVE SUMMARY

The Investment Case in Brief

Dubai Islands is the only large-scale new waterfront district in Dubai still trading at early-positioning prices. Palm Jumeirah, Dubai Marina, JBR, Bluewaters and Emaar Beachfront have all matured and repriced. The thesis is deliberately unglamorous: government infrastructure of this scale has reliably pulled surrounding waterfront values higher across every prior Dubai precedent, and the same catalyst is being deployed here now, before the bridge opens and before the premium is priced in.

AED 2,000-2,500	~48%	AED 917bn	2026
CURRENT OFF-PLAN ENTRY, PER SQFT	AVERAGE GLOBAL WATERFRONT PREMIUM (KNIGHT FRANK)	DUBAI 2025 TRANSACTIONS, AN ALL-TIME RECORD	MAINLAND BRIDGE COMPLETION

> *Every major Dubai waterfront has delivered a durable premium over mainland product. Dubai Islands is the same trade, entered one cycle earlier.*
>
> BRADLEY JAMES · M&M REAL ESTATE

WHY THIS, WHY NOW

The Six-Part Investment Thesis

01

Pre-consensus entry

The last new Dubai waterfront still priced before the market has re-rated it. Every comparable enclave is now fully valued.

02

A government-funded catalyst

Roads, a four-lane mainland bridge, six marinas and 80+ hotels are sovereign-backed capital that lifts private values over time.

03

The waterfront premium

Beachfront homes globally command a 76% premium over inland (Knight Frank); Dubai shorelines have repeated this for two decades.

04

Scarcity of new shoreline

Buildable, master-planned beachfront is finite. Dubai Islands adds 20+ km of it once, then it is gone.

05

Capital-flow tailwind

Dubai cleared a record AED 917bn of transactions in 2025; wealth and population migration continue to underpin demand.

06

Optionality

A 10-year Golden Visa at AED 2M, freehold title, and a deep short-let yield market sit on top of the capital-growth case.

THE ASSET

What Dubai Islands Is

Dubai Islands is Nakheel's five-island masterplan off the historic Deira coastline on the northern edge of the city, connected to the mainland by a new multi-lane bridge corridor. It is the government's second deliberate waterfront district to sit alongside Palm Jumeirah, designed from the outset around beaches, marinas and resort hospitality rather than retrofitted onto existing land.

5	18.6 km^2	20+ km	80+
INTERCONNECTED ISLANDS	TOTAL MASTERPLAN AREA	NEW PUBLIC BEACHES	HOTELS & RESORTS PLANNED

The distinction from Palm Jumeirah matters: Dubai Islands plugs directly into Deira, one of the city's oldest and most densely populated commercial districts. It is not an isolated trophy address. It is new waterfront stitched onto an existing population and transport centre, which shortens the path to occupancy, footfall and rental demand.

The Five Islands

01

Central Island

The civic and retail heart: the densest mix of residences, hotels, beach clubs and the primary public-beach activation.

02

Marina Island

Berth-adjacent living around the flagship marina. The natural home of the short-let and yacht-owner demand pool.

03

Shore Island

Lower-density beachfront and resort frontage, weighted toward branded and lifestyle-led product.

04

Golf Island

Green-anchored, lower-rise residential positioning for end-users and families seeking space over density.

05

Elite Island

The exclusivity tier: the scarcest plots and the trophy frontage that tends to set the ceiling price for the whole development.

THE MACRO BACKDROP

Why Dubai, and Why Now

A single project is only as strong as the market it sits in. Dubai has just printed three consecutive record years of transaction activity, driven by structural wealth migration, a zero personal-income-tax regime and a dollar-pegged currency. Off-plan now dominates the market, exactly the format Dubai Islands is sold in.

DUBAI MARKET	2024	2025	Q1 2026
Transaction value	AED 761bn	AED 917bn	**AED 252bn**
Number of deals	226,000	270,000+	**60,303**
Value growth, YoY	+20%	+20%	**+31%**
Off-plan share	~61%	~72%	**~72%**

INVESTOR TAKEAWAY

You are not betting on a market turning. You are positioning inside the most liquid, fastest-growing prime property market in the world, at its least-priced new waterfront.

THE CATALYST

The Infrastructure Investment Case

The mechanism is simple and well-evidenced in Dubai: sovereign infrastructure creates the conditions for private appreciation. Connectivity, hospitality and amenity are being delivered first; values follow as the destination completes. The commitments here are specific and contracted, not aspirational.

01

Mainland bridge

A 1,425m, four-lane-each-way bridge linking Dubai Islands to Bur Dubai, with capacity for ~16,000 vehicles per hour, targeted for 2026.

02

Corridor upgrade

The wider Al Shindagha / Infinity Bridge corridor, a multi-billion-dirham road programme, materially cuts journey times into Deira and Downtown.

03

Six marinas

A 614-berth marina programme for vessels up to 60m, anchoring the yacht-owner and short-let demand pool around the water.

04

80+ hotels & resorts

Internationally branded keys from operators across the Marriott, Radisson, Accor and IHG groups, building tourist footfall and rental demand.

05

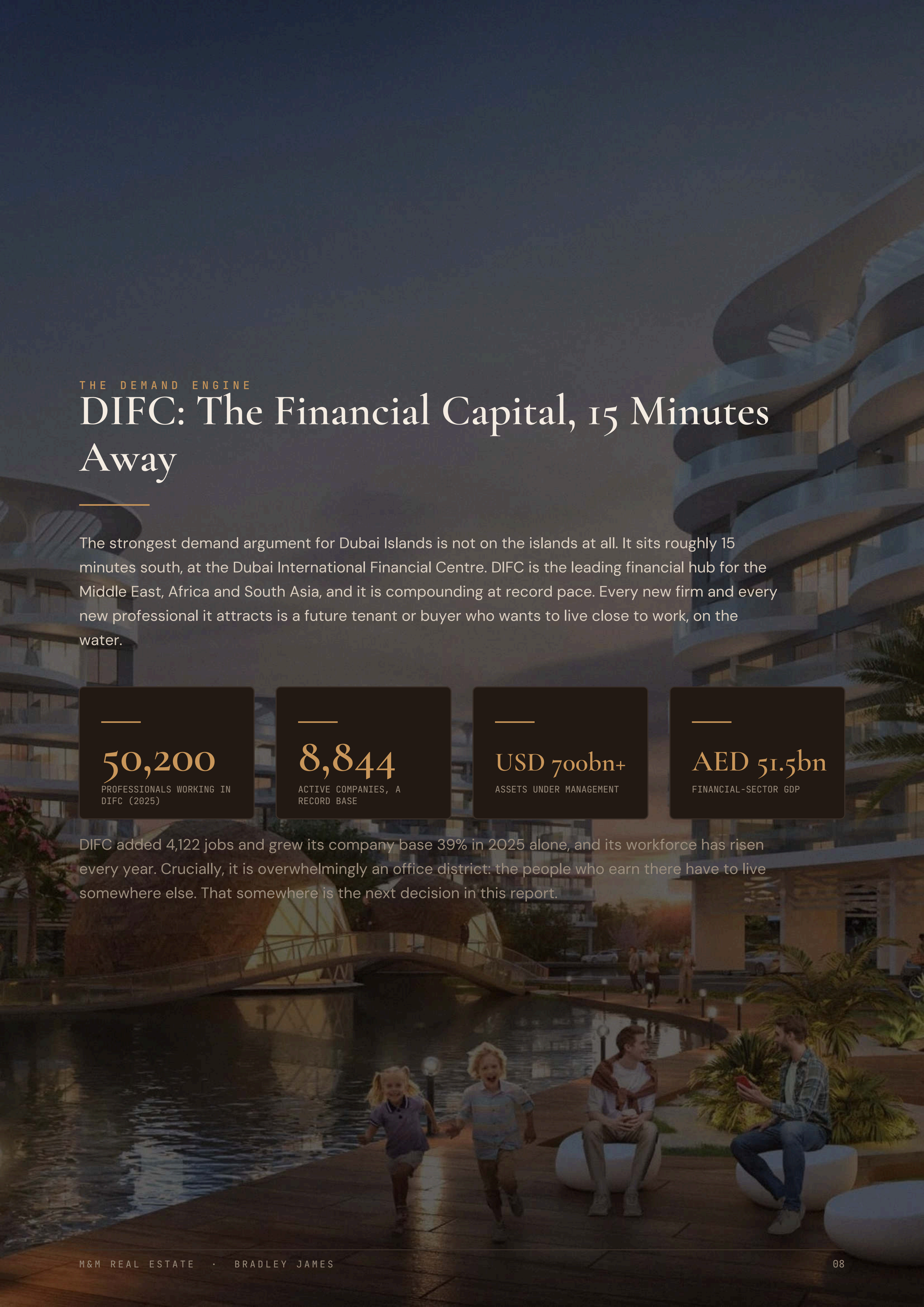
Beaches & parks

More than 20 km of new public beach (including a Blue Flag beach) and roughly 2 km² of parks, the amenity that underwrites the premium.

06

Live contracts

Nakheel's AED 2.6bn Bay Villas community contract and a further Island B infrastructure award confirm capital is being deployed on the ground now.



THE DEMAND ENGINE

DIFC: The Financial Capital, 15 Minutes Away

The strongest demand argument for Dubai Islands is not on the islands at all. It sits roughly 15 minutes south, at the Dubai International Financial Centre. DIFC is the leading financial hub for the Middle East, Africa and South Asia, and it is compounding at record pace. Every new firm and every new professional it attracts is a future tenant or buyer who wants to live close to work, on the water.

50,200
PROFESSIONALS WORKING IN DIFC (2025)

8,844
ACTIVE COMPANIES, A RECORD BASE

USD 700bn+
ASSETS UNDER MANAGEMENT

AED 51.5bn
FINANCIAL-SECTOR GDP

DIFC added 4,122 jobs and grew its company base 39% in 2025 alone, and its workforce has risen every year. Crucially, it is overwhelmingly an office district: the people who earn there have to live somewhere else. That somewhere is the next decision in this report.

THE DEMAND ENGINE

DIFC 2.0: The AED 100 Billion Expansion

In 2024 Dubai launched DIFC 2.0, the Zabeel District, a roughly AED 100 billion (USD 27bn) expansion that will more than double the financial centre. It is designed to host over 125,000 professionals and more than 42,000 companies, with the world's largest dedicated innovation and AI campus at its core. This is the single largest concentration of new high-income employment in Dubai's history, and it is being built now.

DIFC 2.0 · ZABEEL DISTRICT	FIGURE
Investment	~AED 100bn (USD 27.2bn)
Total built-up area	17.7 million sqft
Target workforce	125,000+ professionals
Company capacity	42,000+ companies
Residential allocation	Only ~1.5 million sqft
Delivery	Phased, ~2030 to 2040

INVESTOR TAKEAWAY

DIFC 2.0 is designed to house over 125,000 high earners while allocating barely 1.5 million sqft to homes inside the district. That housing demand has to land somewhere. The nearest new waterfront is Dubai Islands.

THE THESIS

The 15-Minute Commute Premium

Now put the two facts together. A financial district expanding toward 175,000 total professionals, almost no housing inside it, and a brand-new waterfront around 15 minutes away via the upgraded Al Shindagha Corridor and the 2026 bridge. Across the world, the most valuable residential addresses are the high-amenity homes closest to the highest-income jobs. Dubai Islands is being priced before that link is even complete.

WHY DIFC PROFESSIONALS WILL LIVE HERE

A 15-minute commute
The new bridge and Al Shindagha Corridor put DIFC and Downtown roughly 15 to 20 minutes away as the links complete.

Waterfront over density
Beach, marina and resort living instead of dense Downtown and Business Bay towers, at a lower price per sqft.

Live where you holiday
20+ km of beach, hotels and marinas on the doorstep: the lifestyle a high earner actually wants.

WHAT IT MEANS FOR YOUR ASSET

A deep tenant pool
Tens of thousands of well-paid DIFC professionals are a structural, rent-paying demand base for your unit.

Rental resilience
Employment-anchored demand is far more durable than pure-tourist or speculative rental demand.

Buy ahead of completion
The commute and the pricing both improve once the bridge opens. The entry window is now.

THE CORE THESIS

The Waterfront Premium

The entire case rests on one durable, measurable fact: water commands a premium, and it persists. Knight Frank's Global Waterfront Index puts the average premium of a waterfront home over an equivalent inland one at roughly 48%, rising sharply for the most sought-after frontage. This is not a Dubai quirk; it is a global, decades-long pricing constant.

WATER TYPE	PREMIUM VS INLAND	CHARACTER
Beachfront	76%	The scarcest, highest-premium frontage
Coastal	66%	Sea proximity without direct beach
Estuary / harbour	64%	Sheltered water, marina-led
Global average	~48%	Across all waterfront types

INVESTOR TAKEAWAY

Dubai Islands is a beachfront and marina product, the top two premium tiers, bought before that premium has been applied. That gap between today's entry price and the established-waterfront price is the trade.

THE EVIDENCE

What Waterfront Commands Worldwide

Across global cities, waterfront does not merely hold a premium, it compounds one. Knight Frank's ranking of city waterfront premiums shows just how far the gap can run in mature markets. Dubai Islands is being priced today as if that gap does not exist.

CITY WATERFRONT	PREMIUM VS CITY	TIER
Sydney	121%	**World's highest city premium**
Auckland	76%	**Harbour-led scarcity**
Gold Coast	71%	**Beachfront resort demand**
Perth	69%	**Riverfront and coastal**
Cap d'Antibes	59%	**Mediterranean trophy coast**
International average	~40%	**Across surveyed cities**

In Sydney, waterfront homes cost more than double their inland equivalents. A premium of even half that magnitude, applied to Dubai Islands as it completes, reprices the asset substantially from today's entry.

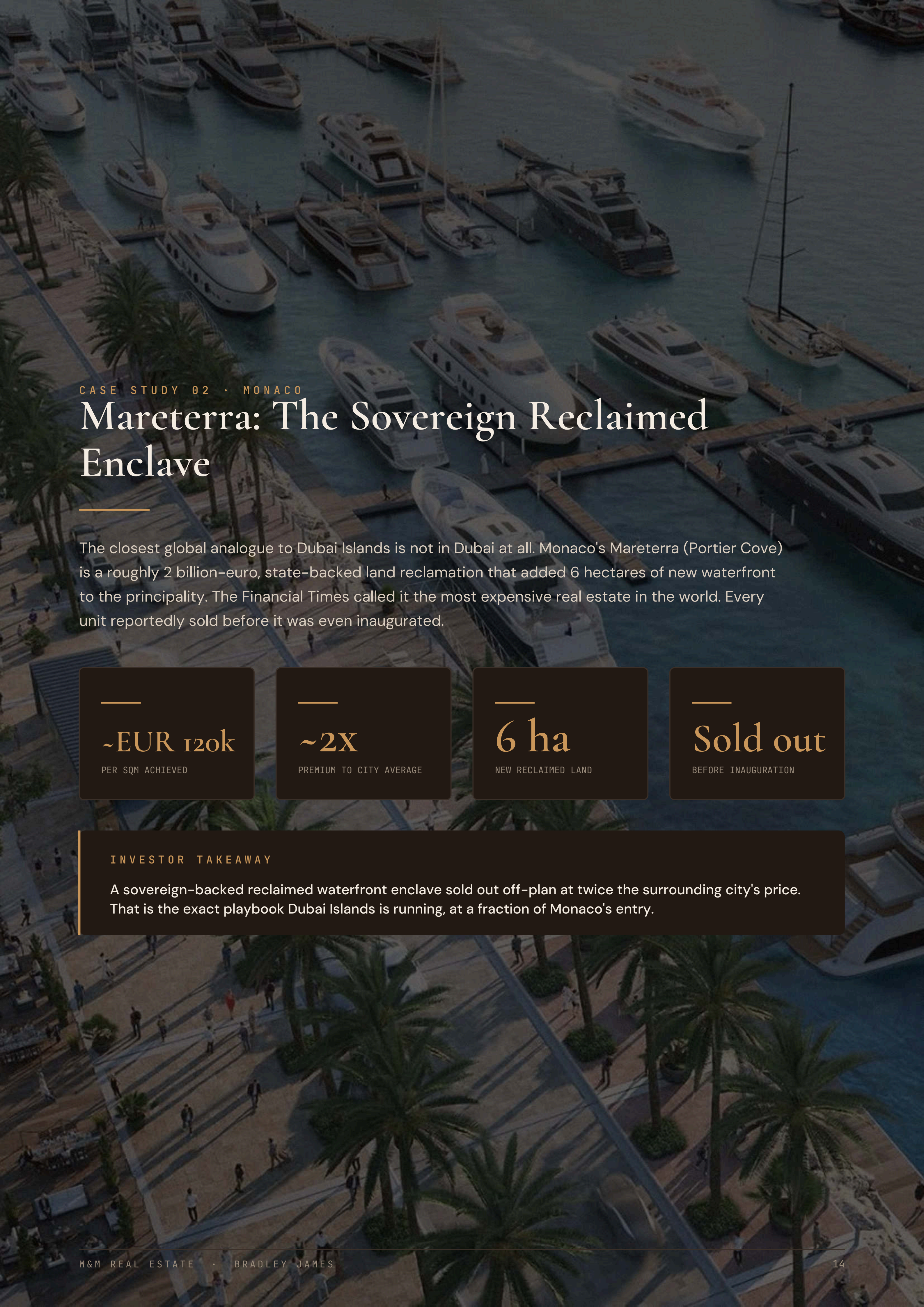
CASE STUDY 01 · DUBAI

Palm Jumeirah: The Template

Palm Jumeirah is the precedent the entire Dubai Islands thesis is modelled on, and an honest one: it ran hard, corrected hard, then compounded for over a decade. It launched looking expensive against the mainland, peaked into 2008, fell roughly 50% in the global financial crisis, then rebuilt to become Dubai's premier address. The lesson is the long arc, not a straight line.

PALM JUMEIRAH	STAGE	FIGURE
Launch (2002-04)	Off-plan entry	**~AED 520 / sqft (est.)**
2008	Cycle peak, then -50%	**Garden Homes ~AED 14M, then halved**
2024	Best apt growth in Dubai	**+31% in a single year**
2026	Villas / apartments	**AED 5,897 / AED 4,022 per sqft**

From an estimated AED 520 psf at launch to roughly AED 4,000–5,900 psf today. Launch pricing is a market estimate; current figures are Bayut's May 2026 indices. Corrections happen, conviction and a long horizon are rewarded.



CASE STUDY 02 · MONACO

Mareterra: The Sovereign Reclaimed Enclave

The closest global analogue to Dubai Islands is not in Dubai at all. Monaco's Mareterra (Portier Cove) is a roughly 2 billion-euro, state-backed land reclamation that added 6 hectares of new waterfront to the principality. The Financial Times called it the most expensive real estate in the world. Every unit reportedly sold before it was even inaugurated.

~EUR 120k	~2x	6 ha	Sold out
PER SQM ACHIEVED	PREMIUM TO CITY AVERAGE	NEW RECLAIMED LAND	BEFORE INAUGURATION

INVESTOR TAKEAWAY

A sovereign-backed reclaimed waterfront enclave sold out off-plan at twice the surrounding city's price. That is the exact playbook Dubai Islands is running, at a fraction of Monaco's entry.

CASE STUDY 03 · SINGAPORE

Sentosa Cove: Scarcity, and the Honest Caution

Sentosa Cove is the only place in Singapore where foreigners may buy landed waterfront homes, the definition of scarcity. It is also the most useful cautionary tale in this report. The scarce land held and recovered; over-leveraged, speculative off-plan condo product did not. The discipline lesson is to buy the scarcity, not the hype, and not to over-borrow.

WHY THE SCARCITY HELD

+ Foreigner-only access
The single legal waterfront entry point in Singapore protects long-run land value.

+ Bungalow prices firm
Land-led prices rose ~15.8% in 2023 even as transaction volume fell.

+ Record trophy sales
Top bungalows have traded above S$2,700 per sqft.

THE CAUTION WE HEED

! Off-plan condos corrected
W Residences cut prices 40%+; over-leveraged owners took 30–40% losses.

! Liquidity is thin
Trophy assets sell slowly; size positions to your true horizon.

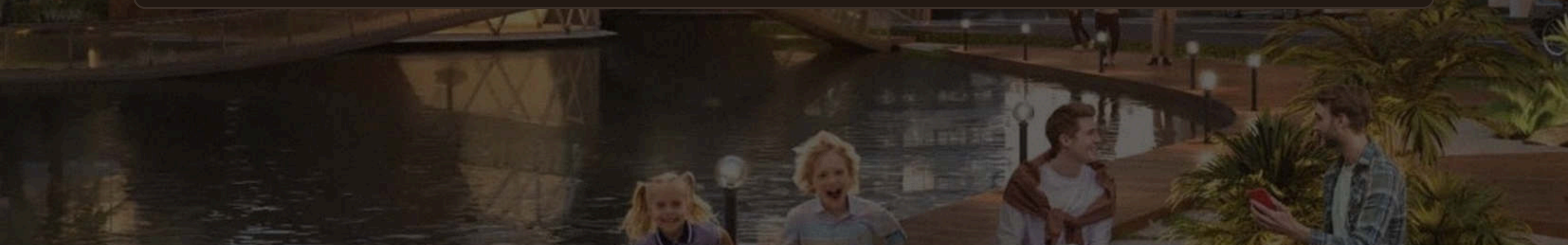
! Leverage amplifies cycles
Scarcity protects value over time, not a forced sale at the bottom.

CASE STUDY 04 · GLOBAL

Where the Billionaires Already Are

Look at where the world's largest fortunes concentrate residential capital and the answer is almost always scarce, gated, water-bound land. The records below are not outliers; they are the ceiling that prime waterfront tends to drift toward as a market matures. Dubai Islands is the same asset class, one cycle early.

TROPHY WATERFRONT	BENCHMARK	NOTE
Indian Creek, Miami	US$170M record	**Zuckerberg purchase; ~84 residents**
Fisher Island, Miami	~US$2,369 / sqft	**+15% in 2025; top US income ZIP**
Point Piper, Sydney	A$130M record	**Australia's top three home sales**
The Peak, Hong Kong	US$140M (2025)	**HK$1.088bn; year's most expensive**
Mareterra, Monaco	~EUR 120k / sqm	**Most expensive real estate on earth**



Every one of these enclaves is defined by capped supply and water. Dubai Islands shares the DNA; it has simply not been priced like it yet.

THE DUBAI RECORD

Every Dubai Waterfront Has Repriced

This is the precedent that matters most, because it is the same developer ecosystem, the same regulator and the same buyer pool. Each Dubai waterfront launched, matured and settled at a durable premium. Emaar Beachfront is the most recent and cleanest proof: a verified +70% over four years to 2025.

	LAUNCH PSF (EST.)	CURRENT PSF	TRAJECTORY
Palm Jumeirah	~AED 520	AED 4,000–5,900	**The template**
Dubai Marina	~AED 850	AED 2,323	**Matured**
JBR (The Walk)	~AED 950	AED 2,597	**Matured**
Bluewaters Island	~AED 1,600	AED 4,917	**Strong re-rate**
Emaar Beachfront	~AED 1,800	AED 4,250	**+70% to 2025**
Dubai Islands	AED 2,000–2,500	Early stage	**To follow**

Launch-era psf are market estimates; current psf are Bayut May 2026 indices; Emaar Beachfront +70% is Betterhomes (Q3 2021 to Q3 2025). The pattern, not any single number, is the point.

PRICING INTELLIGENCE

Today's Entry Points

BEACHFRONT / FIRST ROW

AED 3,000-3,500 psf

Direct beach frontage, first-row positioning. The scarcest product and the natural ceiling-setter. Comparable to early JBR launch pricing, with a modern resort masterplan around it.

MARINA & CANAL FACING

AED 2,200-2,800 psf

Berth-adjacent and water-view stock. The strongest short-let yield profile, feeding directly off the marina and hotel footfall.

RELATIVE VALUE	CURRENT PSF	PREMIUM TO ISLANDS
Palm Jumeirah	AED 4,000-5,900	**+90% to +160%**
Bluewaters Island	AED 4,917	**~+110%**
Emaar Beachfront	AED 4,250	**~+85%**
Dubai Islands (entry)	AED 2,000-2,500	**Baseline**

MARKET DYNAMICS

Supply and Demand

Price is set at the margin, where demand meets available supply. On Dubai Islands the demand drivers are broad and structural, while the supply of genuine first-row beachfront is fixed by the masterplan. That asymmetry is what creates the premium over time.

DEMAND DRIVERS

DIFC on the doorstep
DIFC 2.0 targets 125,000+ professionals 15 minutes away, with almost no housing inside the district.

Record capital inflows
AED 917bn of 2025 transactions; sustained wealth and population migration into Dubai.

Tourism & short-let
80+ hotels and 20+ km of beach create a deep holiday-rental demand pool.

Visa-linked end-users
Golden Visa eligibility pulls genuine occupiers, not just traders.

SUPPLY CONSTRAINTS

Finite first-row
Beachfront plots are capped by the masterplan and cannot be added later.

Phased delivery
Infrastructure-led release controls the pace of new stock hitting the market.

Single master developer
Nakheel's control of the land bank limits oversupply risk versus open districts.

RETURNS MODELLING

Bear, Base and Bull

A serious investor underwrites the downside first. Below is an illustrative seven-year frame for a first-row beachfront unit, spanning a conservative outcome through to full re-rating toward established-waterfront pricing. These are scenarios, not forecasts.

CONSERVATIVE

+35%

Capital growth of ~3% p.a. and a 6% blended yield. Assumes the waterfront premium only partly applies and the cycle is soft. The asset still compounds.

BASE CASE

+90%

Partial waterfront re-rating as the bridge and marinas complete, plus a 7% blended short-let yield over the hold. The central planning case.

BULL / PARITY

+160%

Pricing drifts toward today's established-waterfront psf as the destination matures, on top of yield. The Palm-parity outcome.

Illustrative seven-year scenarios only. Past performance does not guarantee future results. No financial advice is implied.

INCOME

Yield and Cash Flow

Unlike a pure land play, Dubai Islands pays you to wait. The marina, beach and hotel cluster supports a short-let holiday-rental market with gross yields that comfortably outrun mature waterfront districts. Below is an illustrative annual frame for a first-row beachfront unit during the hold.

ILLUSTRATIVE · 1,000 SQFT BEACHFRONT	FIGURE
Entry price	AED 3,200,000
Blended gross yield	~7%
Gross annual rent	~AED 224,000
Net annual income (after costs)	~AED 175,000
Base-case 7-year exit value	~AED 5,200,000
Indicative total 7-year return	~90%

Illustrative only; yields and costs vary by unit, operator and occupancy. Short-let income is not guaranteed.

WHO IS BUILDING

The Developer Landscape

Developer selection is the single biggest determinant of outcome on an off-plan waterfront. Nakheel is the master developer; a curated set of private developers is building the residential product around it. The names below are the ones with confirmed Dubai Islands projects.

01 **Nakheel**

Master developer and landowner. Delivering Bay Villas (636 homes, AED 2.6bn contract) and the Rixos-branded hotel and residences.

02 **Ellington Properties**

Design-led private developer with multiple island schemes: Ellington Sands, Ellington Cove and Meriva Residences.

03 **Imtiaz Developments**

Beach Walk Residences and the Sunset Bay series, weighted to beachfront and lifestyle product.

04 **Beyond (Omniyat)**

The ultra-prime, design-forward arm building on the islands; the trophy-tier positioning to watch.

05 **Prestige One & others**

A widening field of seaside apartment schemes; developer quality and frontage, not brand noise, decide value.

THE HONEST VIEW

Risk Register, and How We Underwrite It

No serious capital moves without a candid downside. These are the real risks; alongside each is how we position to manage it. Conviction is earned by naming the bear case, not hiding it.

STRUCTURAL TAILWINDS

Sovereign infrastructure
Contracted, funded and underway, not speculative; the catalyst is real.

Record, liquid market
Three record years; the deepest prime buyer pool in the world.

Scarcity by design
Finite first-row supply under one master developer.

Yield while you wait
A short-let market that pays during the hold.

RISKS WE UNDERWRITE

Delivery & timing
Phased build; we favour funded developers with track records and realistic handovers.

Cycle risk
Dubai corrects; we size to a long horizon and avoid over-leverage.

Supply pace
Monitor launch volume; buy frontage and quality, not just postcode.

Liquidity
Trophy stock sells slowly; match the asset to your true holding period.

OWNERSHIP & EXIT

Structuring, Visa and Liquidity

Deploying serious capital is as much about how you hold and exit as what you buy. Dubai's framework is built for international ownership: freehold title, no personal income or capital-gains tax, and a residency pathway attached to the asset.

Freehold title

Dubai Islands sits in a designated freehold zone: full, perpetual foreign ownership of the property and the land share, registered with the Dubai Land Department.

Holding structure

Larger positions are often held via a company or SPV (UAE free-zone or offshore) for succession, privacy and multi-asset consolidation. We coordinate this with your advisers.

Golden Visa

A property purchase at or above AED 2M qualifies the owner and family for a renewable 10-year residency, a meaningful pull for genuine end-user demand.

Exit routes

Off-plan assignment before handover, secondary resale at completion, or hold-and-let for income. Multiple exits reduce dependence on any single market window.

INVESTOR TAKEAWAY

Title, tax and visa all line up in the investor's favour. The structuring question is not whether you can own it cleanly, it is how to hold it most efficiently for your horizon.

DEPLOYMENT

How to Deploy, and Who This Suits

The right entry depends on the mandate. Across the family offices and private investors I work with, capital into Dubai Islands tends to fall into three archetypes, each with a different unit, frontage and developer profile.

01 **Capital preservation**

Lower-density, branded or end-user stock on Golf or Shore Island. Prioritises downside protection and a clean long-term hold over maximum upside.

02 **Yield plus growth**

Marina-facing one and two-bed units feeding the short-let market. The income-while-you-wait position, with full participation in the re-rating.

03 **Trophy and lifestyle**

First-row Elite or Central Island frontage. The scarcest plots, the ceiling-setters, bought for both the asset and the use of it.

INVESTOR TAKEAWAY

In five years Dubai Islands will be built out and fully priced. The infrastructure is being deployed now, the developers are committed now, and the pricing has not yet moved. The window is before the bridge opens, not after.

VERIFY EVERY FIGURE

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VERIFY EVERY FIGURE

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