

Monthly Indicators

April 2026

U.S. existing-home sales fell 3.6% month-over-month and 1.0% year-over-year to a seasonally adjusted annual rate of 3.98 million, according to the National Association of REALTORS® (NAR), as tight supply and ongoing affordability challenges constrained activity. Sales declined month-over-month in all four regions. Year-over-year, sales increased in the South and West but fell in the Midwest and Northeast.

Closed Sales increased 5.7 percent for Detached homes but decreased 20.2 percent for Attached homes. Pending Sales increased 19.0 percent for Detached homes but decreased 18.0 percent for Attached homes.

The Median Sales Price was down 1.7 percent to \$1,180,000 for Detached homes but increased 3.4 percent to \$760,000 for Attached homes. Days on Market increased 14.8 percent for Detached homes and 36.0 percent for Attached homes. Supply decreased 26.3 percent for Detached homes and 32.5 percent for Attached homes.

Nationally, the median existing-home price rose 1.4% from a year earlier to \$408,800, marking the 33rd consecutive month of year-over-year price increases as limited inventory continued to put upward pressure on prices, NAR said. There were 1.36 million homes for sale heading into April, up 2.3% from a year earlier, representing a 4.1-month supply at the current sales pace.

Monthly Snapshot

\$1,180,000 **\$760,000** **\$1,035,000**

Median Sales Price
Detached Homes

Median Sales Price
Attached Homes

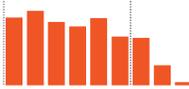
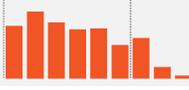
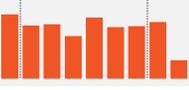
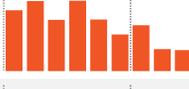
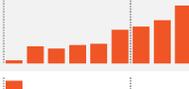
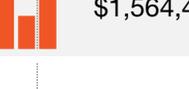
Median Sales Price
All Properties Combined

A research tool provided by the North San Diego County REALTORS® for residential real estate activity in North San Diego County. Percent changes are calculated using rounded figures.

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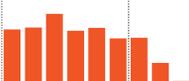
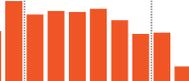
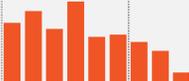
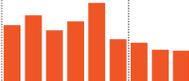
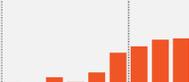
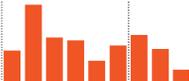
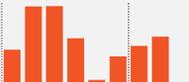
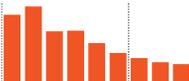
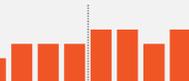
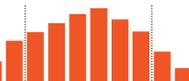
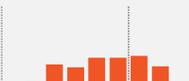
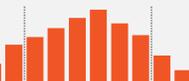
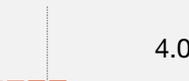
Single-Family Detached Activity Overview

Key metrics by report month and for year-to-date (YTD) starting from the first of the year. **Detached homes only.**

Key Metrics	Historical Sparkbars			4-2025	4-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
	04-2024	04-2025	04-2026						
New Listings				1,158	1,149	- 0.8%	4,089	4,074	- 0.4%
Pending Sales				647	770	+ 19.0%	2,415	2,663	+ 10.3%
Closed Sales				718	759	+ 5.7%	2,213	2,357	+ 6.5%
Days on Market				27	31	+ 14.8%	32	36	+ 12.5%
Median Sales Price				\$1,200,000	\$1,180,000	- 1.7%	\$1,166,396	\$1,153,500	- 1.1%
Average Sales Price				\$1,564,410	\$1,596,220	+ 2.0%	\$1,559,412	\$1,538,600	- 1.3%
Pct. of Orig. Price Received				98.6%	98.5%	- 0.1%	98.0%	97.9%	- 0.1%
Housing Affordability Index				23	24	+ 4.3%	23	25	+ 8.7%
Inventory of Homes for Sale				2,274	1,755	- 22.8%	--	--	--
Months Supply of Inventory				3.8	2.8	- 26.3%	--	--	--

Single-Family Attached Activity Overview

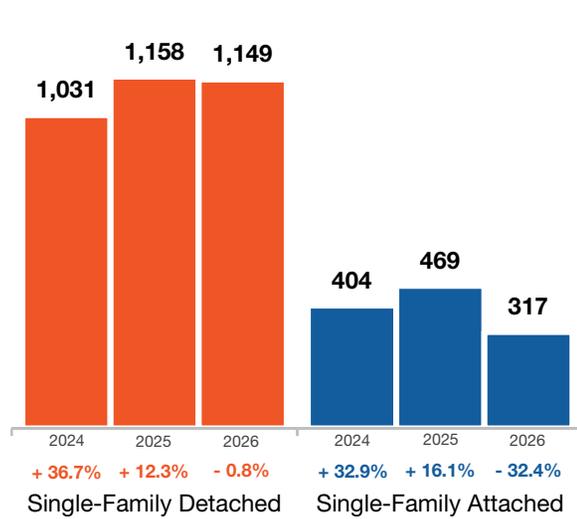
Key metrics by report month and for year-to-date (YTD) starting from the first of the year. **Attached homes only.**

Key Metrics	Historical Sparkbars			4-2025	4-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
	04-2024	04-2025	04-2026						
New Listings				469	317	- 32.4%	1,828	1,404	- 23.2%
Pending Sales				272	223	- 18.0%	1,026	923	- 10.0%
Closed Sales				292	233	- 20.2%	966	840	- 13.0%
Days on Market				25	34	+ 36.0%	34	36	+ 5.9%
Median Sales Price				\$735,000	\$760,000	+ 3.4%	\$730,000	\$755,000	+ 3.4%
Average Sales Price				\$854,465	\$905,452	+ 6.0%	\$844,973	\$880,364	+ 4.2%
Pct. of Orig. Price Received				98.6%	98.1%	- 0.5%	98.3%	97.7%	- 0.6%
Housing Affordability Index				37	38	+ 2.7%	37	38	+ 2.7%
Inventory of Homes for Sale				994	643	- 35.3%	--	--	--
Months Supply of Inventory				4.0	2.7	- 32.5%	--	--	--

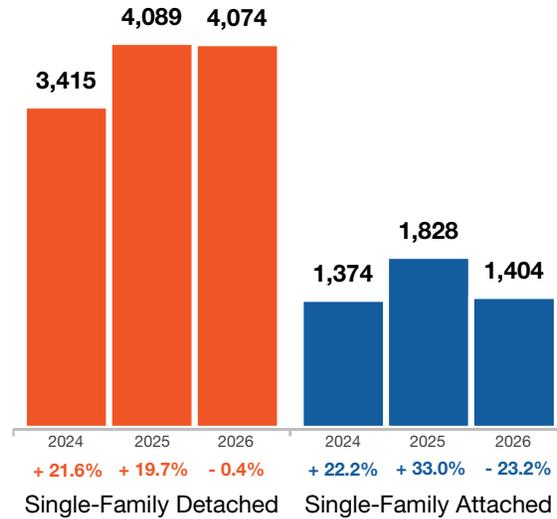
New Listings

A count of the properties that have been newly listed on the market in a given month.

April

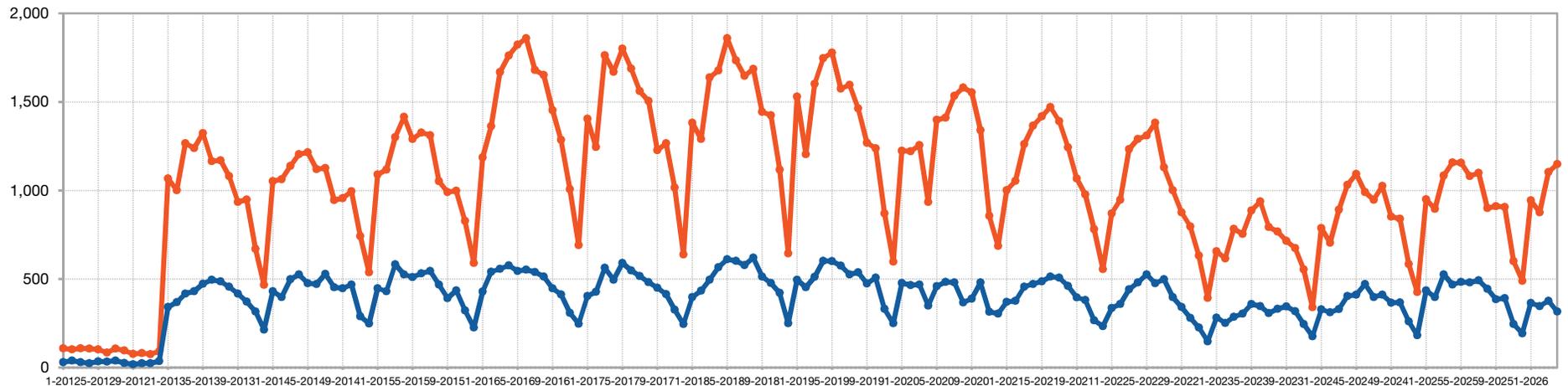


Year to Date



New Listings	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
May-2025	1,156	+5.7%	483	+17.2%
Jun-2025	1,082	+9.2%	480	+1.9%
Jul-2025	1,099	+16.1%	493	+23.9%
Aug-2025	900	-12.2%	444	+8.0%
Sep-2025	911	+6.9%	385	+5.2%
Oct-2025	906	+7.7%	391	+6.3%
Nov-2025	601	+2.7%	245	-5.8%
Dec-2025	489	+14.8%	193	+6.0%
Jan-2026	944	-0.6%	364	-16.5%
Feb-2026	877	-2.1%	346	-12.8%
Mar-2026	1,104	+1.8%	377	-28.3%
Apr-2026	1,149	-0.8%	317	-32.4%
12-Month Avg	935	+3.4%	377	-3.8%

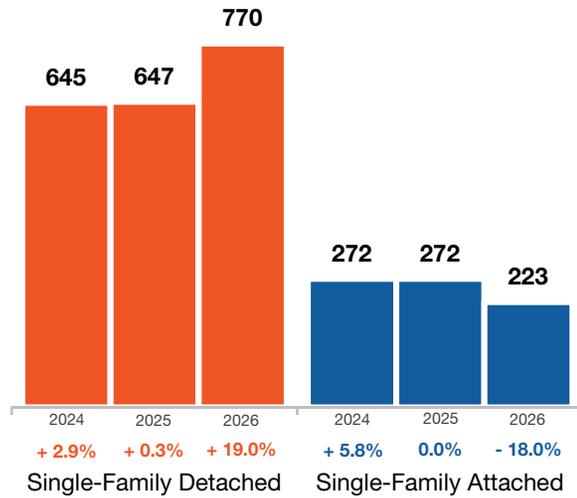
Historical New Listings by Month



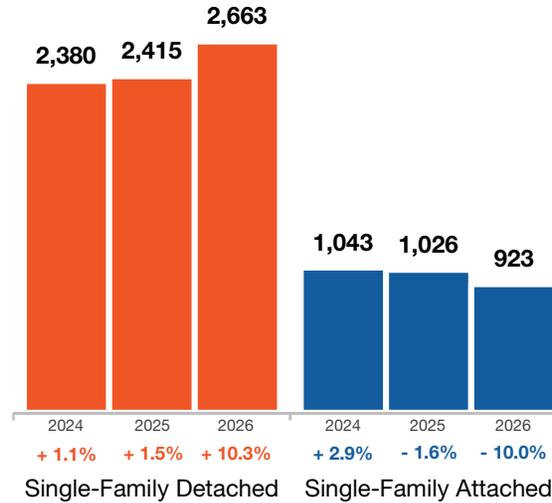
Pending Sales

A count of the properties on which offers have been accepted in a given month.

April

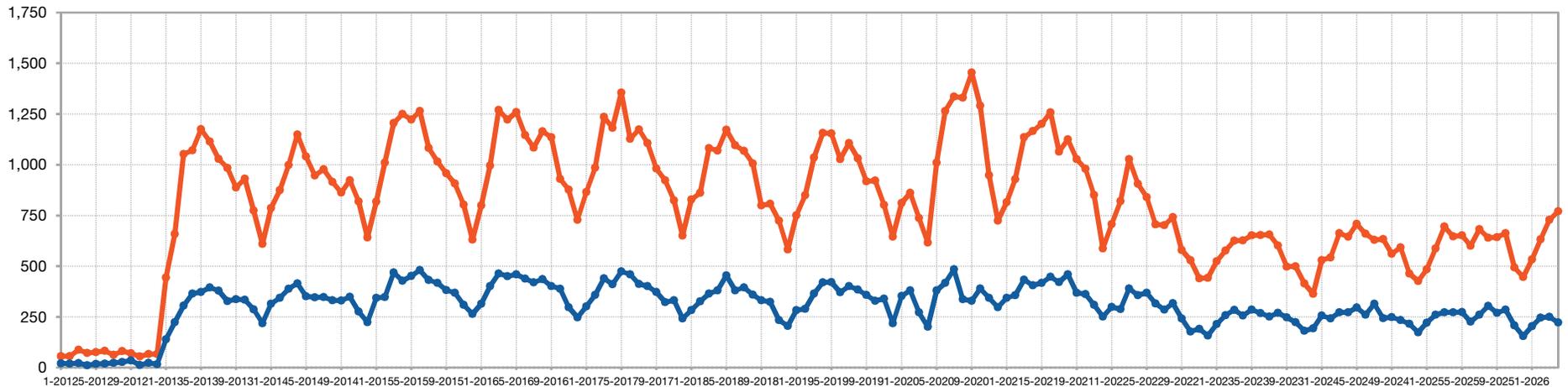


Year to Date



Pending Sales	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
May-2025	652	-7.9%	274	-7.4%
Jun-2025	600	-9.1%	226	-13.1%
Jul-2025	682	+8.3%	260	-17.5%
Aug-2025	640	+0.9%	304	+24.6%
Sep-2025	643	+14.6%	270	+8.4%
Oct-2025	662	+11.8%	286	+22.2%
Nov-2025	494	+6.5%	208	-3.7%
Dec-2025	446	+4.4%	155	-10.4%
Jan-2026	533	+9.9%	204	-7.7%
Feb-2026	632	+7.7%	246	-5.4%
Mar-2026	728	+4.6%	250	-8.4%
Apr-2026	770	+19.0%	223	-18.0%
12-Month Avg	591	+5.5%	251	-3.6%

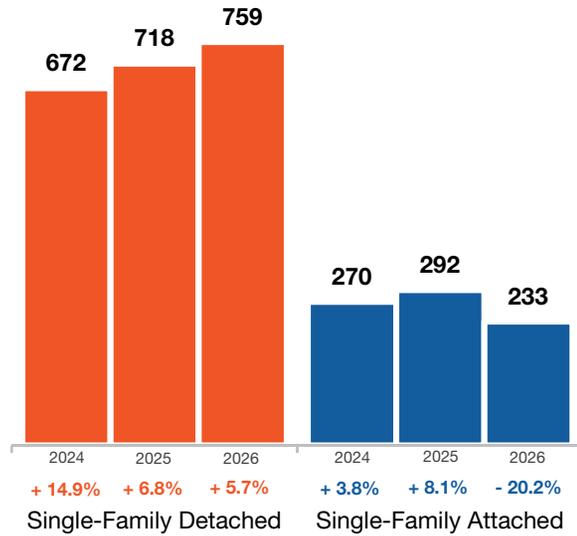
Historical Pending Sales by Month



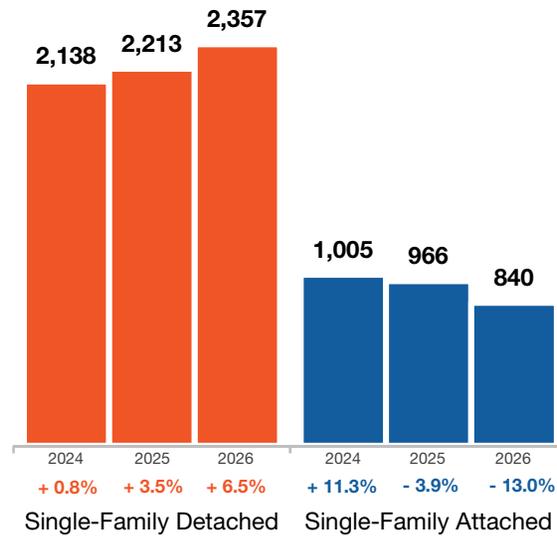
Closed Sales

A count of the actual sales that closed in a given month.

April

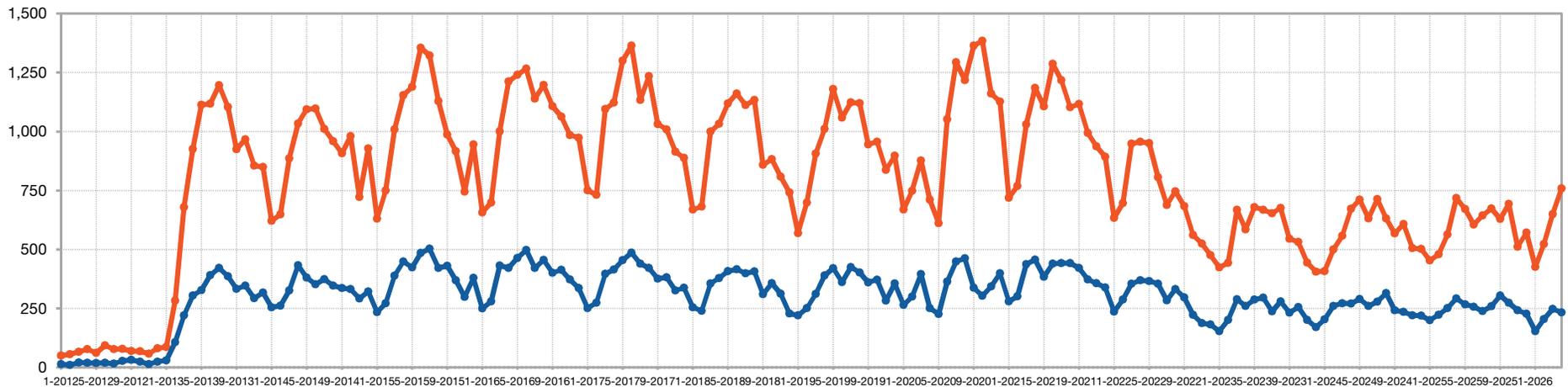


Year to Date



Closed Sales	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
May-2025	671	-5.6%	267	-7.9%
Jun-2025	605	-4.1%	257	-1.2%
Jul-2025	644	-9.7%	239	-14.0%
Aug-2025	673	+6.5%	259	-17.8%
Sep-2025	629	+10.7%	305	+26.0%
Oct-2025	693	+14.0%	274	+16.6%
Nov-2025	511	+1.0%	242	+9.5%
Dec-2025	571	+13.7%	227	+3.7%
Jan-2026	426	-6.0%	154	-23.0%
Feb-2026	522	+9.0%	205	-8.1%
Mar-2026	650	+15.5%	248	-1.2%
Apr-2026	759	+5.7%	233	-20.2%
12-Month Avg	590	+3.8%	252	-3.8%

Historical Closed Sales by Month

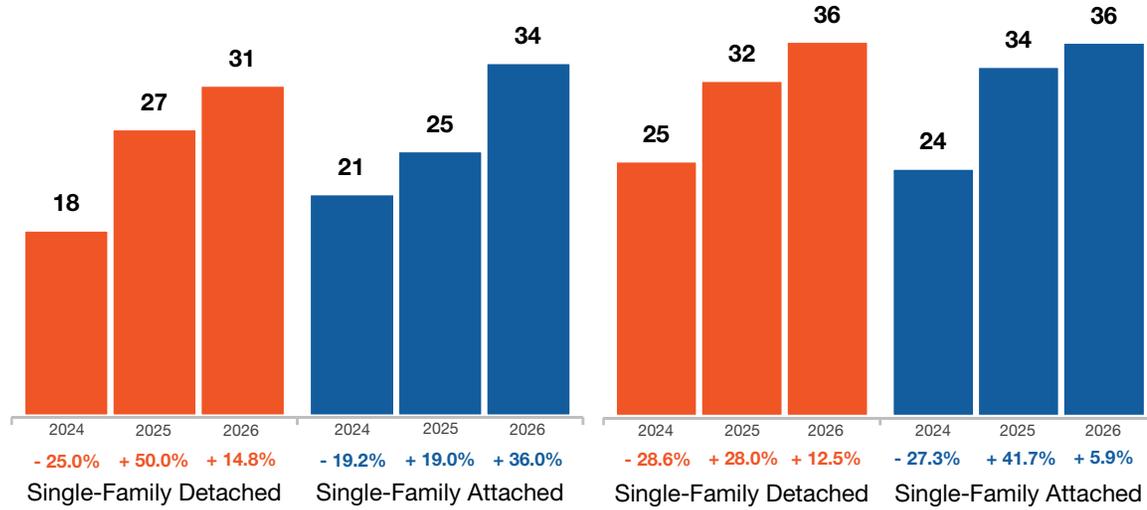


Days on Market Until Sale

Average number of days between when a property is listed and when an offer is accepted in a given month.

April

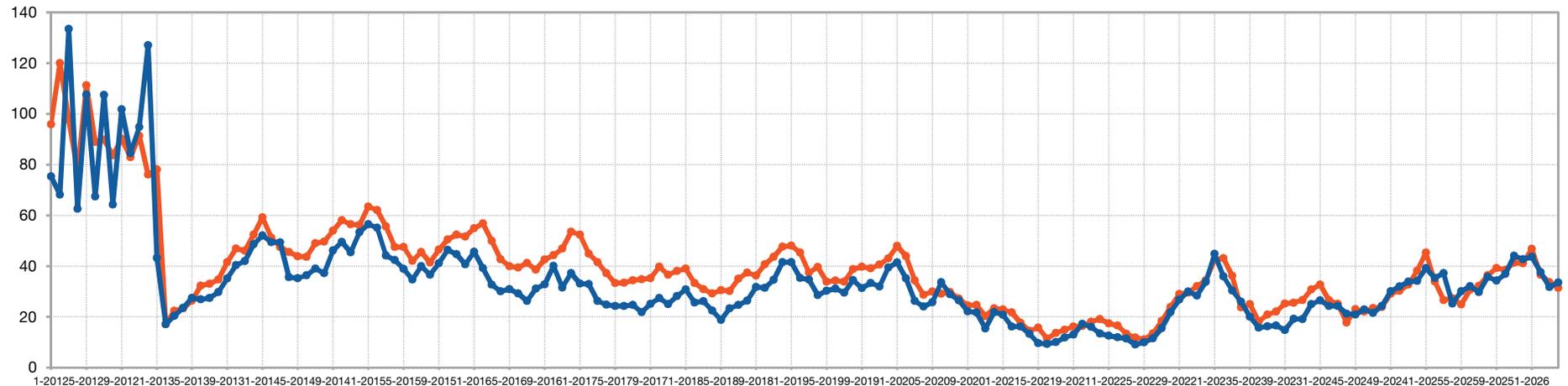
Year to Date



Days on Market	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
May-2025	25	+8.7%	30	+42.9%
Jun-2025	31	+40.9%	32	+39.1%
Jul-2025	32	+39.1%	30	+36.4%
Aug-2025	36	+50.0%	36	+50.0%
Sep-2025	39	+34.5%	34	+13.3%
Oct-2025	38	+26.7%	37	+15.6%
Nov-2025	41	+24.2%	44	+29.4%
Dec-2025	41	+7.9%	43	+26.5%
Jan-2026	47	+4.4%	44	+12.8%
Feb-2026	37	+8.8%	38	+8.6%
Mar-2026	34	+25.9%	32	-13.5%
Apr-2026	31	+14.8%	34	+36.0%
12-Month Avg*	29	+23.3%	29	+22.7%

* Days on Market for all properties from May 2025 through April 2026. This is not the average of the individual figures above.

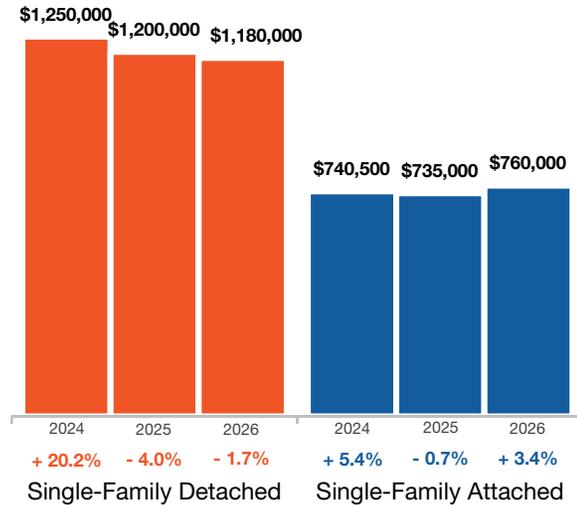
Historical Days on Market Until Sale by Month



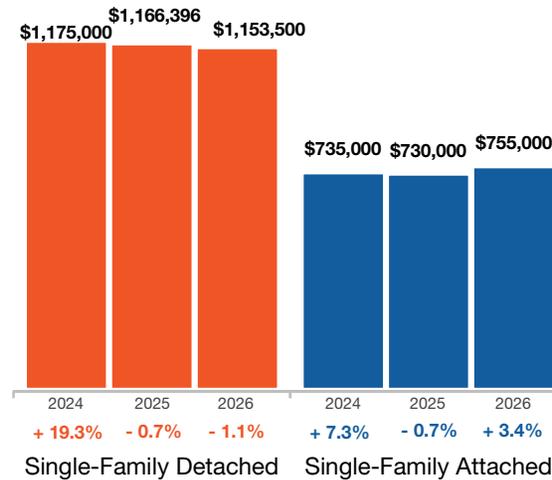
Median Sales Price

Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.

April



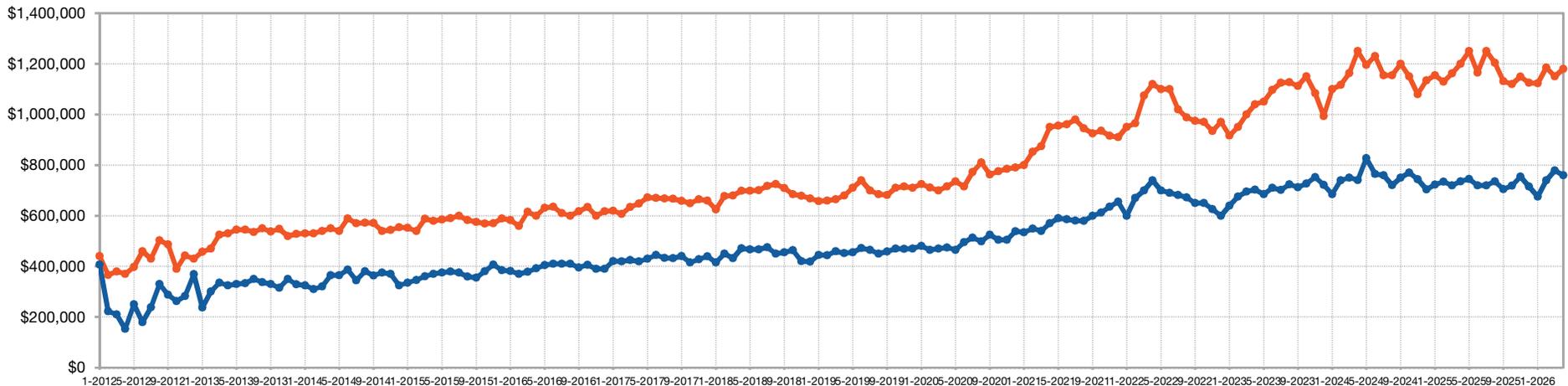
Year to Date



Median Sales Price	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
May-2025	\$1,250,000	+4.6%	\$744,500	-10.0%
Jun-2025	\$1,165,000	-5.3%	\$719,900	-5.9%
Jul-2025	\$1,250,000	+8.2%	\$720,000	-5.2%
Aug-2025	\$1,203,750	+4.2%	\$735,000	+1.9%
Sep-2025	\$1,131,500	-5.7%	\$705,000	-6.0%
Oct-2025	\$1,120,000	-2.6%	\$718,750	-6.7%
Nov-2025	\$1,149,500	+6.4%	\$754,800	+1.5%
Dec-2025	\$1,125,000	-0.9%	\$715,000	+1.6%
Jan-2026	\$1,122,600	-2.8%	\$675,500	-6.6%
Feb-2026	\$1,185,000	+4.9%	\$740,000	+0.8%
Mar-2026	\$1,150,000	-1.0%	\$778,500	+8.1%
Apr-2026	\$1,180,000	-1.7%	\$760,000	+3.4%
12-Month Avg*	\$1,165,000	+0.4%	\$747,120	-2.3%

* Median Sales Price for all properties from May 2025 through April 2026. This is not the average of the individual figures above.

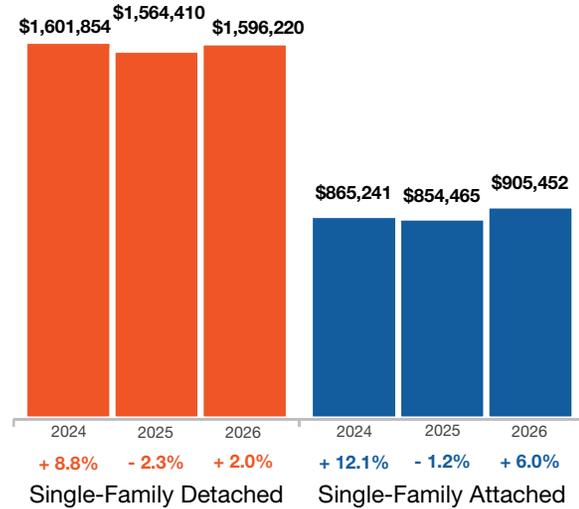
Historical Median Sales Price by Month



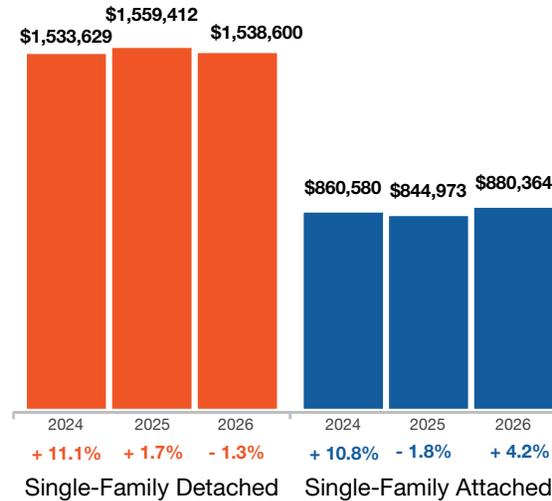
Average Sales Price

Average sales price for all closed sales, not accounting for seller concessions, in a given month.

April



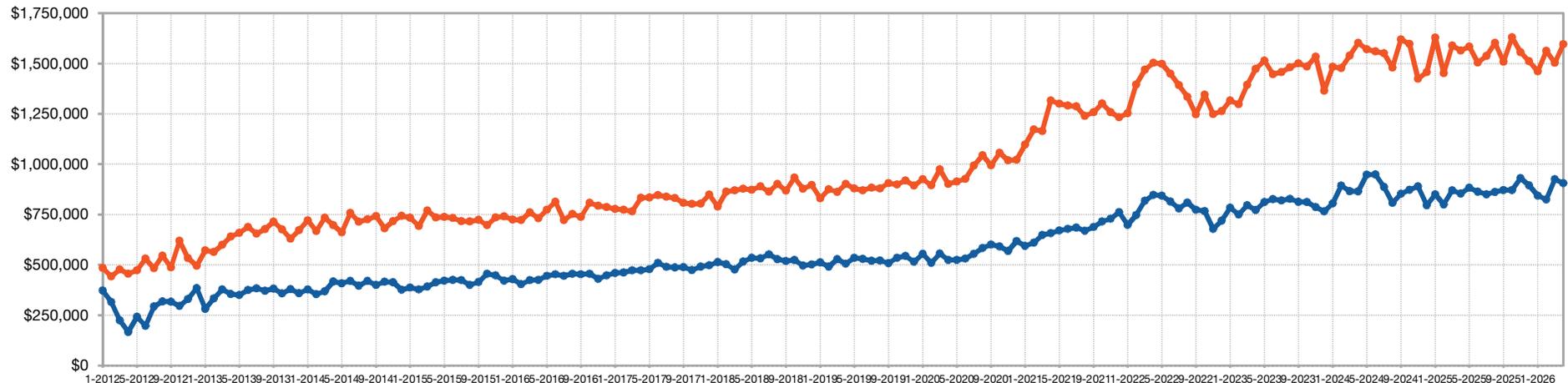
Year to Date



Avg. Sales Price	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
May-2025	\$1,584,046	+0.8%	\$883,688	-6.8%
Jun-2025	\$1,505,164	-3.5%	\$863,892	-8.9%
Jul-2025	\$1,538,085	-0.8%	\$849,544	-4.2%
Aug-2025	\$1,601,739	+8.3%	\$862,274	+6.8%
Sep-2025	\$1,508,255	-6.9%	\$871,211	+2.2%
Oct-2025	\$1,629,771	+2.1%	\$871,369	-0.2%
Nov-2025	\$1,556,145	+9.3%	\$930,984	+4.6%
Dec-2025	\$1,511,680	+3.7%	\$894,977	+12.4%
Jan-2026	\$1,461,257	-10.3%	\$843,603	-0.7%
Feb-2026	\$1,562,682	+7.7%	\$825,344	+3.2%
Mar-2026	\$1,502,915	-5.4%	\$925,303	+6.3%
Apr-2026	\$1,596,220	+2.0%	\$905,452	+6.0%
12-Month Avg*	\$1,546,497	+0.5%	\$877,304	+1.4%

* Avg. Sales Price for all properties from May 2025 through April 2026. This is not the average of the individual figures above.

Historical Average Sales Price by Month

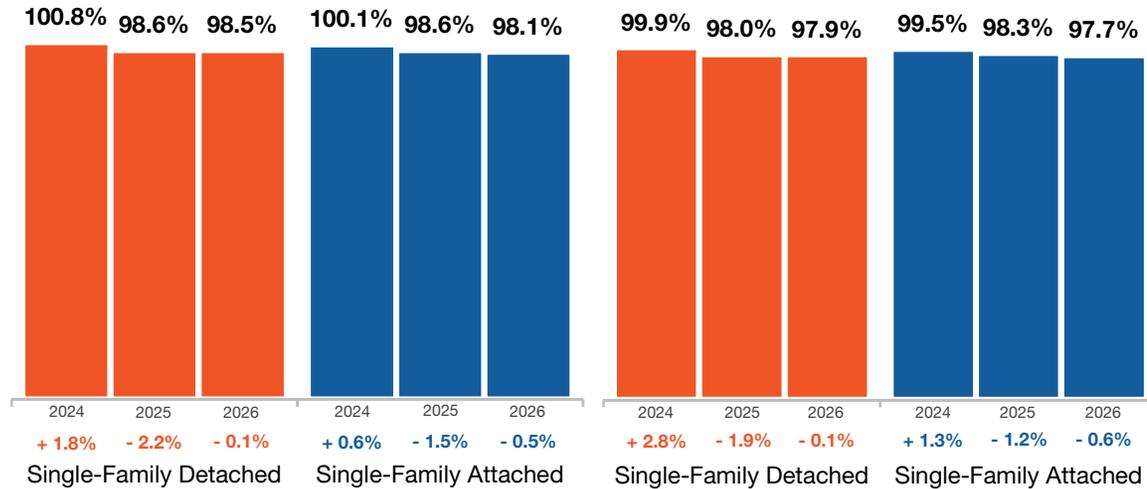


Percent of Original List Price Received

Percentage found when dividing a property's sales price by its original list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.

April

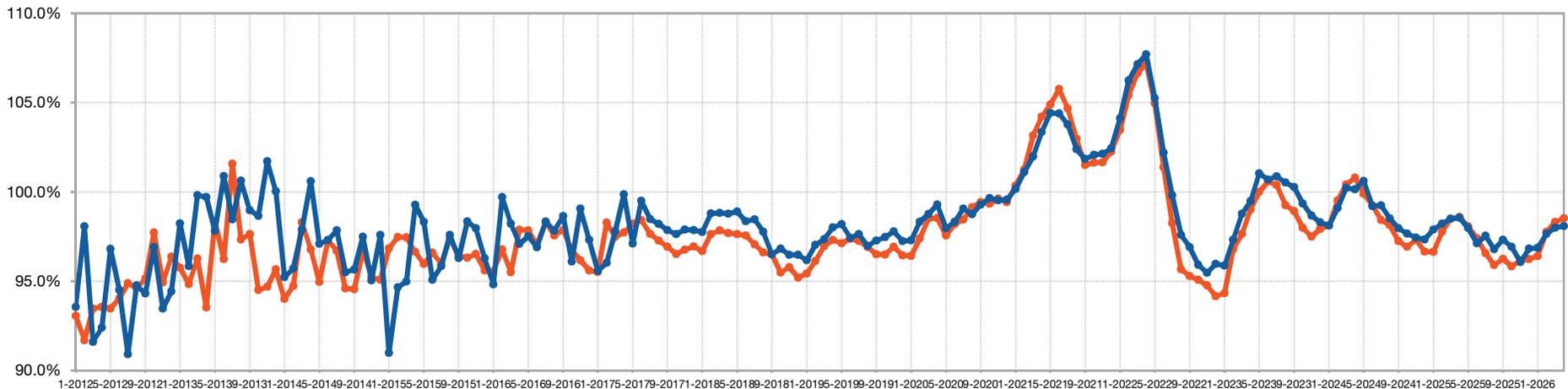
Year to Date



Pct. of Orig. Price Received	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
May-2025	98.1%	-1.8%	98.0%	-2.6%
Jun-2025	97.4%	-1.8%	97.1%	-2.1%
Jul-2025	96.6%	-1.8%	97.5%	-1.7%
Aug-2025	95.9%	-2.2%	96.8%	-1.7%
Sep-2025	96.2%	-1.0%	97.3%	-0.7%
Oct-2025	95.8%	-1.1%	96.9%	-0.8%
Nov-2025	96.2%	-1.1%	96.1%	-1.3%
Dec-2025	96.2%	-0.5%	96.8%	-0.5%
Jan-2026	96.4%	-0.2%	96.9%	-1.0%
Feb-2026	97.7%	-0.1%	97.6%	-0.6%
Mar-2026	98.3%	-0.2%	98.0%	-0.5%
Apr-2026	98.5%	-0.1%	98.1%	-0.5%
12-Month Avg*	96.9%	-1.1%	97.3%	-1.3%

* Pct. of Orig. Price Received for all properties from May 2025 through April 2026. This is not the average of the individual figures above.

Historical Percent of Original List Price Received by Month

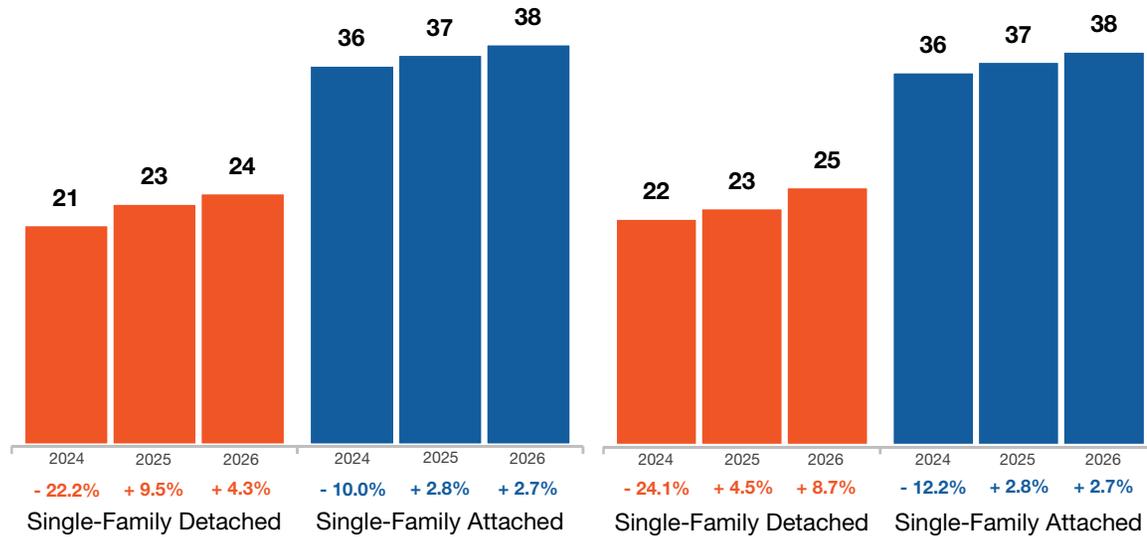


Housing Affordability Index

This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.

April

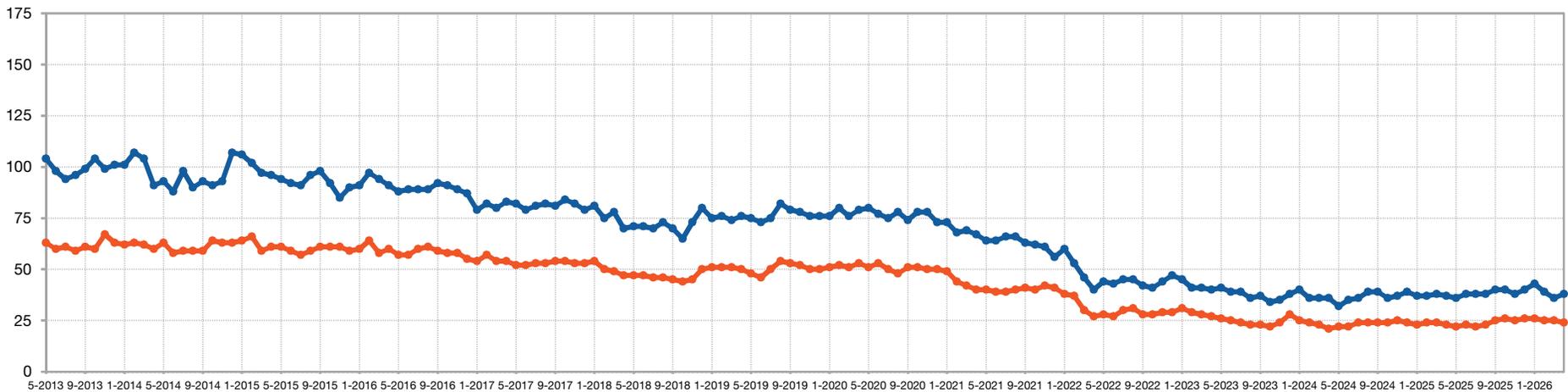
Year to Date



Affordability Index	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
May-2025	22	0.0%	36	+12.5%
Jun-2025	23	+4.5%	38	+8.6%
Jul-2025	22	-8.3%	38	+5.6%
Aug-2025	23	-4.2%	38	-2.6%
Sep-2025	25	+4.2%	40	+2.6%
Oct-2025	26	+8.3%	40	+11.1%
Nov-2025	25	0.0%	38	+2.7%
Dec-2025	26	+8.3%	40	+2.6%
Jan-2026	26	+13.0%	43	+16.2%
Feb-2026	25	+4.2%	39	+5.4%
Mar-2026	25	+4.2%	36	-5.3%
Apr-2026	24	+4.3%	38	+2.7%
12-Month Avg*	24	+2.6%	39	+6.8%

* Affordability Index for all properties from May 2025 through April 2026. This is not the average of the individual figures above.

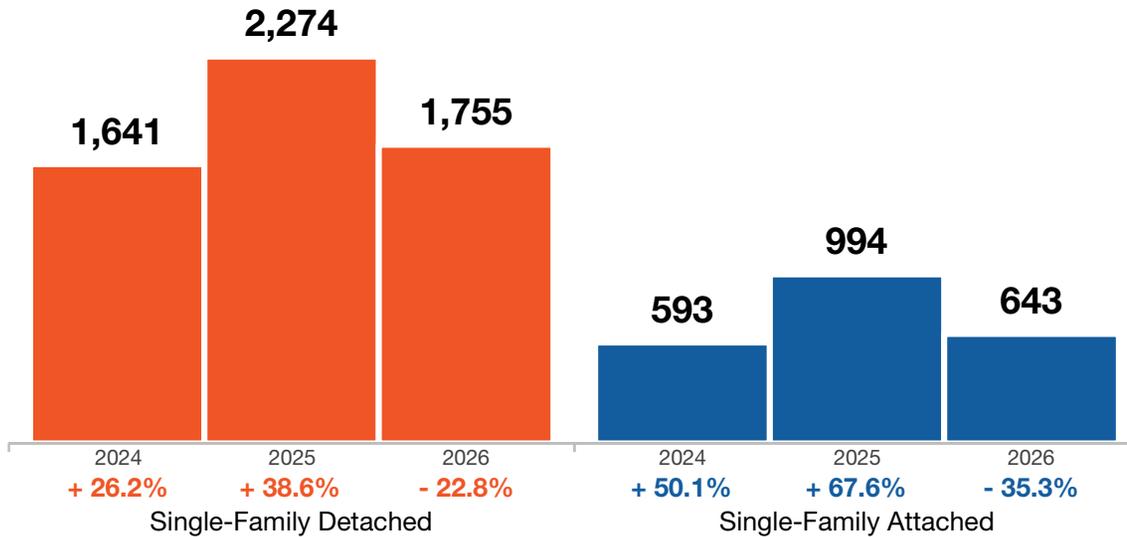
Historical Housing Affordability Index by Month



Inventory of Homes for Sale

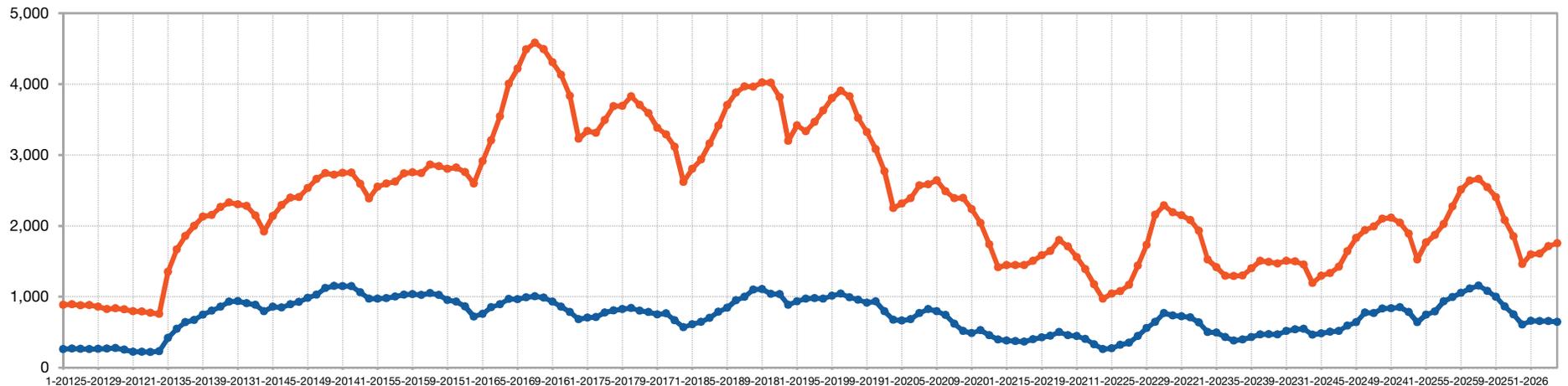
The number of properties available for sale in active status at the end of a given month.

April



Homes for Sale	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
May-2025	2,509	+37.3%	1,054	+64.7%
Jun-2025	2,639	+36.0%	1,116	+44.0%
Jul-2025	2,661	+33.7%	1,156	+50.1%
Aug-2025	2,543	+21.1%	1,079	+29.4%
Sep-2025	2,406	+13.8%	998	+19.5%
Oct-2025	2,082	+2.0%	861	+1.1%
Nov-2025	1,852	-2.1%	748	-4.3%
Dec-2025	1,459	-4.3%	607	-5.2%
Jan-2026	1,594	-9.7%	658	-11.6%
Feb-2026	1,607	-14.1%	656	-17.2%
Mar-2026	1,714	-15.3%	655	-29.9%
Apr-2026	1,755	-22.8%	643	-35.3%
12-Month Avg	1,947	+6.2%	799	+6.7%

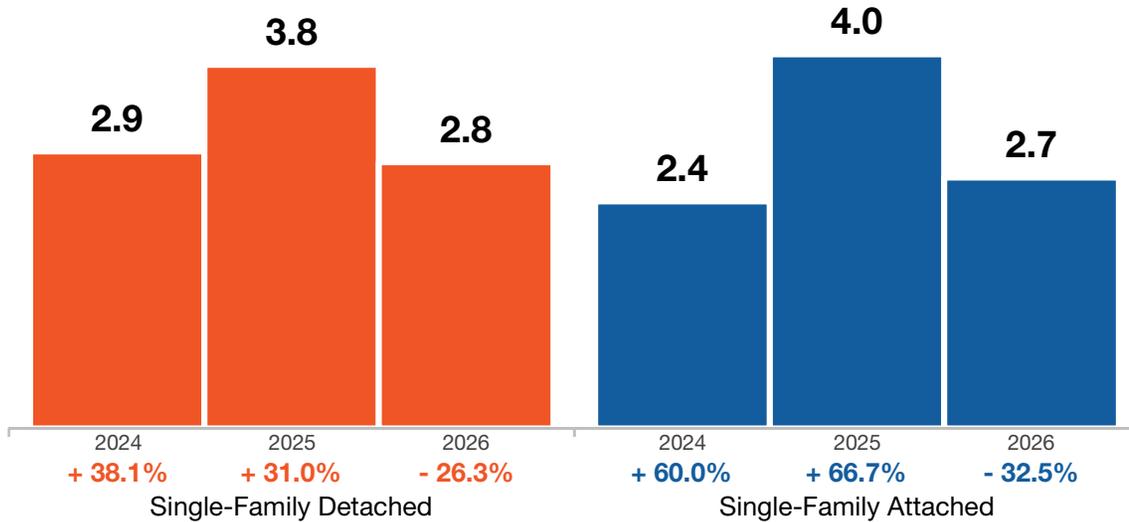
Historical Inventory of Homes for Sale by Month



Months Supply of Inventory

The inventory of homes for sale at the end of a given month, divided by the average monthly pending sales from the last 12 months.

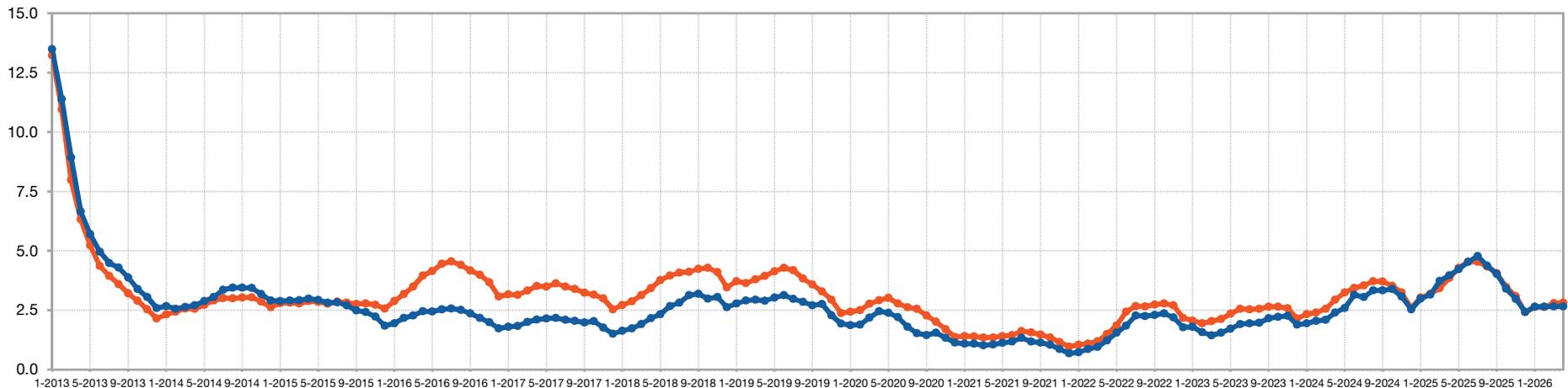
April



Months Supply	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
May-2025	4.3	+34.4%	4.2	+61.5%
Jun-2025	4.5	+32.4%	4.5	+45.2%
Jul-2025	4.5	+28.6%	4.8	+60.0%
Aug-2025	4.3	+16.2%	4.4	+33.3%
Sep-2025	4.1	+10.8%	4.0	+21.2%
Oct-2025	3.5	0.0%	3.4	0.0%
Nov-2025	3.1	-3.1%	3.0	-3.2%
Dec-2025	2.4	-7.7%	2.4	-4.0%
Jan-2026	2.6	-13.3%	2.6	-13.3%
Feb-2026	2.6	-18.8%	2.6	-18.8%
Mar-2026	2.8	-17.6%	2.7	-27.0%
Apr-2026	2.8	-26.3%	2.7	-32.5%
12-Month Avg*	3.4	+2.8%	3.2	+8.0%

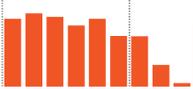
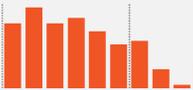
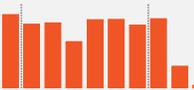
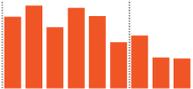
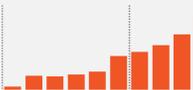
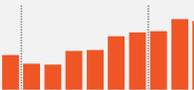
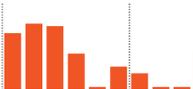
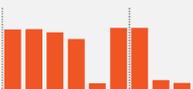
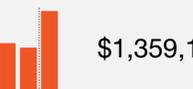
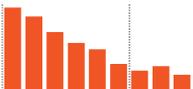
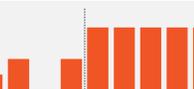
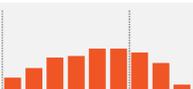
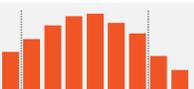
* Months Supply for all properties from May 2025 through April 2026. This is not the average of the individual figures above.

Historical Months Supply of Inventory by Month



All Properties Combined

Key metrics by report month and for year-to-date (YTD) starting from the first of the year.

Key Metrics	Historical Sparkbars			4-2025	4-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
	04-2024	04-2025	04-2026						
New Listings				1,627	1,466	- 9.9%	5,927	5,478	- 7.6%
Pending Sales				919	993	+ 8.1%	3,445	3,586	+ 4.1%
Closed Sales				1,010	992	- 1.8%	3,187	3,198	+ 0.3%
Days on Market				27	32	+ 18.5%	33	36	+ 9.1%
Median Sales Price				\$1,026,500	\$1,035,000	+ 0.8%	\$995,000	\$1,012,500	+ 1.8%
Average Sales Price				\$1,359,158	\$1,434,551	+ 5.5%	\$1,341,471	\$1,365,501	+ 1.8%
Pct. of Orig. Price Received				98.6%	98.4%	- 0.2%	98.1%	97.9%	- 0.2%
Housing Affordability Index				27	28	+ 3.7%	27	28	+ 3.7%
Inventory of Homes for Sale				3,323	2,400	- 27.8%	--	--	--
Months Supply of Inventory				3.9	2.8	- 28.2%	--	--	--