

Monthly Indicators

July 2026

U.S. existing-home sales declined 2.4% from the previous month to a seasonally adjusted annual rate of 4.09 million units, according to the National Association of REALTORS® (NAR). Regionally, sales increased in the Northeast but declined in the West, South, and Midwest. Compared to a year earlier, existing-home sales rose 2.8%, with gains in the Midwest, South, and West while remaining unchanged in the Northeast.

Closed Sales increased 8.4 percent for Detached homes and 40.2 percent for Attached homes. Pending Sales decreased 2.3 percent for Detached homes and 7.4 percent for Attached homes.

The Median Sales Price was up 0.2 percent to \$1,232,500 for Detached homes and 2.3 percent to \$718,900 for Attached homes. Days on Market decreased 3.1 percent for Detached homes but increased 9.7 percent for Attached homes. Supply decreased 42.2 percent for Detached homes and 32.7 percent for Attached homes.

Nationally, the median existing-home price hit a new record of \$440,600, a 1.8% increase from a year earlier, NAR reported. Home prices have now increased on an annual basis for 36 consecutive months, reflecting continued demand despite inventory remaining below historically balanced levels. Heading into July, there were 1.56 million properties for sale, down 0.6% month-over-month but up 1.3% from the same period last year, representing a 4.6-month supply at the current sales pace. Homes spent a median of 28 days on the market, with first-time homebuyers accounting for 33% of home purchases.

Monthly Snapshot

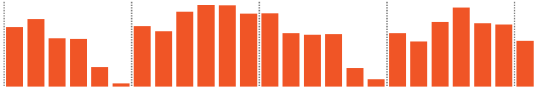
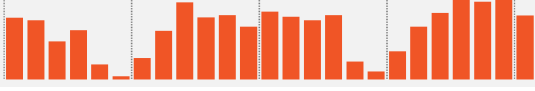
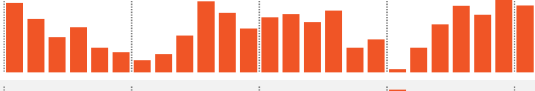
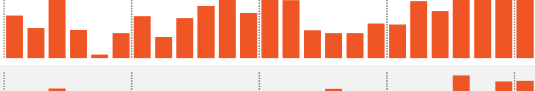
\$1,232,500	\$718,900	\$1,075,000
Median Sales Price Detached Homes	Median Sales Price Attached Homes	Median Sales Price All Properties Combined

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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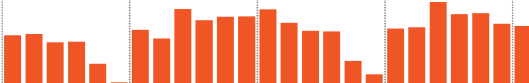
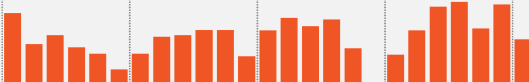
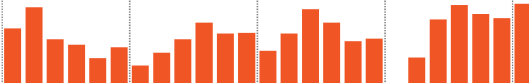
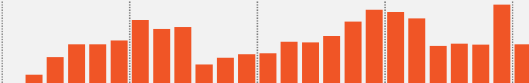
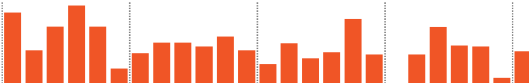
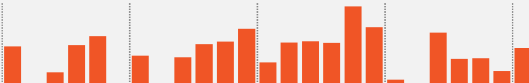
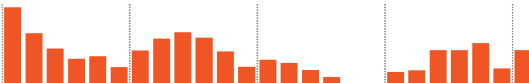
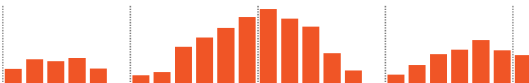
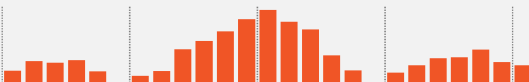
Single-Family Detached Activity Overview

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			7-2025	7-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
	07-2024	07-2025	07-2026						
New Listings				1,143	872	- 23.7%	7,879	7,025	- 10.8%
Pending Sales				710	694	- 2.3%	4,639	4,874	+ 5.1%
Closed Sales				693	751	+ 8.4%	4,421	4,672	+ 5.7%
Days on Market				32	31	- 3.1%	30	32	+ 6.7%
Median Sales Price				\$1,230,000	\$1,232,500	+ 0.2%	\$1,159,500	\$1,199,000	+ 3.4%
Average Sales Price				\$1,494,228	\$1,622,478	+ 8.6%	\$1,506,751	\$1,566,828	+ 4.0%
Pct. of Orig. Price Received				96.6%	98.0%	+ 1.4%	97.7%	98.2%	+ 0.5%
Housing Affordability Index				22	23	+ 4.5%	24	23	- 4.2%
Inventory of Homes for Sale				2,811	1,686	- 40.0%	--	--	--
Months Supply of Inventory				4.5	2.6	- 42.2%	--	--	--

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.**

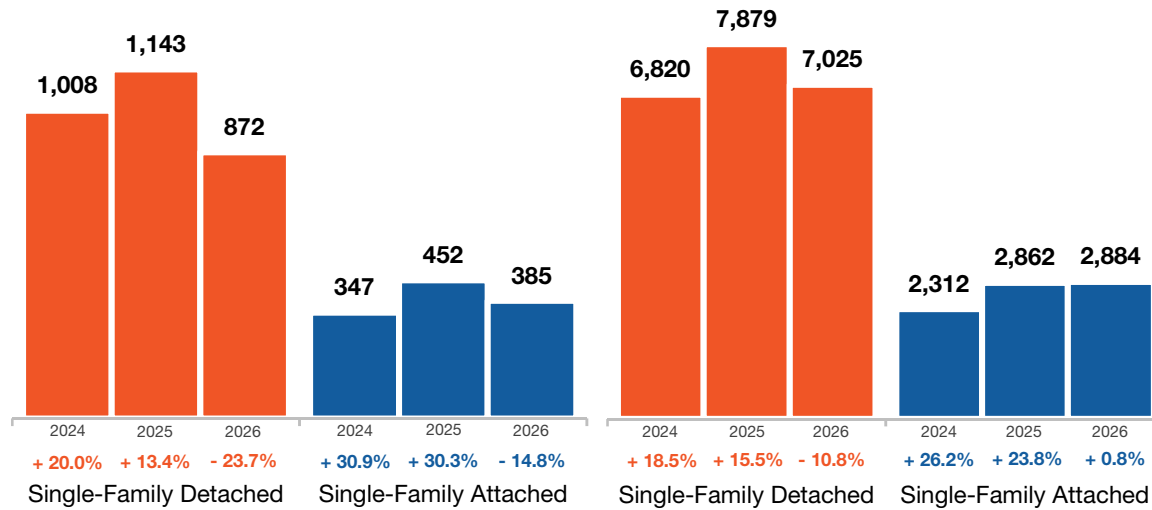
Key Metrics	Historical Sparkbars			7-2025	7-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
	07-2024	07-2025	07-2026						
New Listings				452	385	- 14.8%	2,862	2,884	+ 0.8%
Pending Sales				231	214	- 7.4%	1,505	1,706	+ 13.4%
Closed Sales				194	272	+ 40.2%	1,456	1,613	+ 10.8%
Days on Market				31	34	+ 9.7%	33	37	+ 12.1%
Median Sales Price				\$702,500	\$718,900	+ 2.3%	\$725,000	\$716,500	- 1.2%
Average Sales Price				\$834,535	\$859,328	+ 3.0%	\$851,891	\$839,229	- 1.5%
Pct. of Orig. Price Received				97.5%	97.9%	+ 0.4%	98.0%	97.7%	- 0.3%
Housing Affordability Index				39	39	0.0%	38	39	+ 2.6%
Inventory of Homes for Sale				1,063	813	- 23.5%	--	--	--
Months Supply of Inventory				5.2	3.5	- 32.7%	--	--	--

New Listings

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

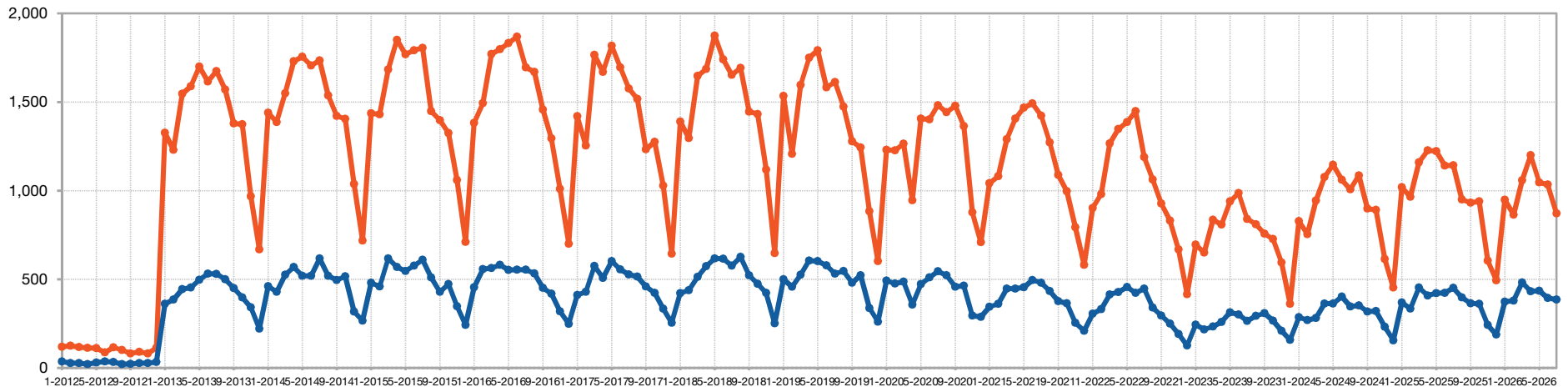
July

Year to Date



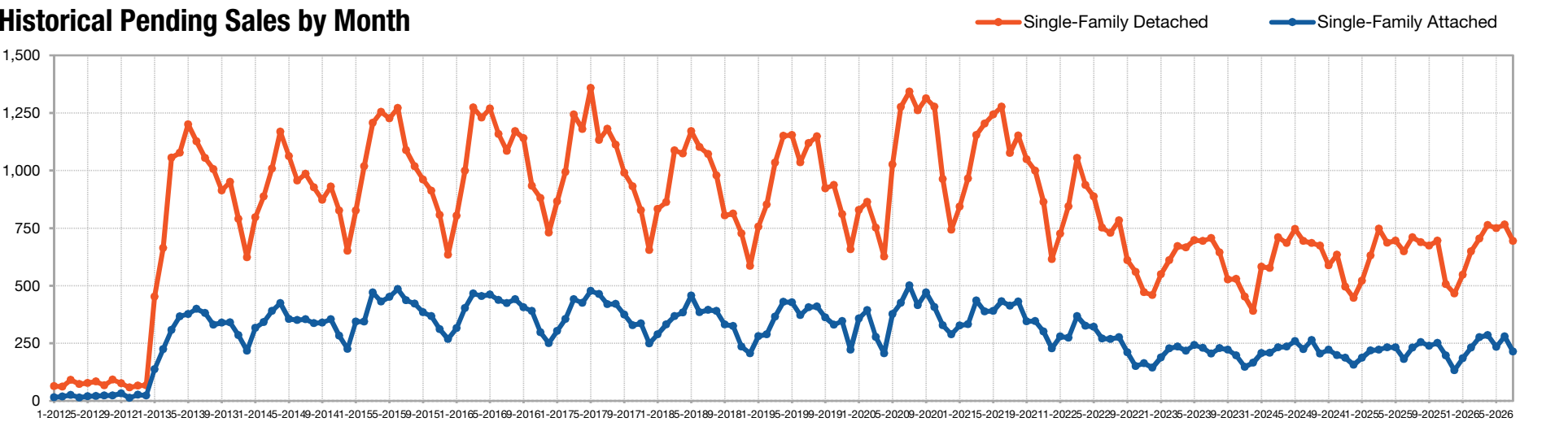
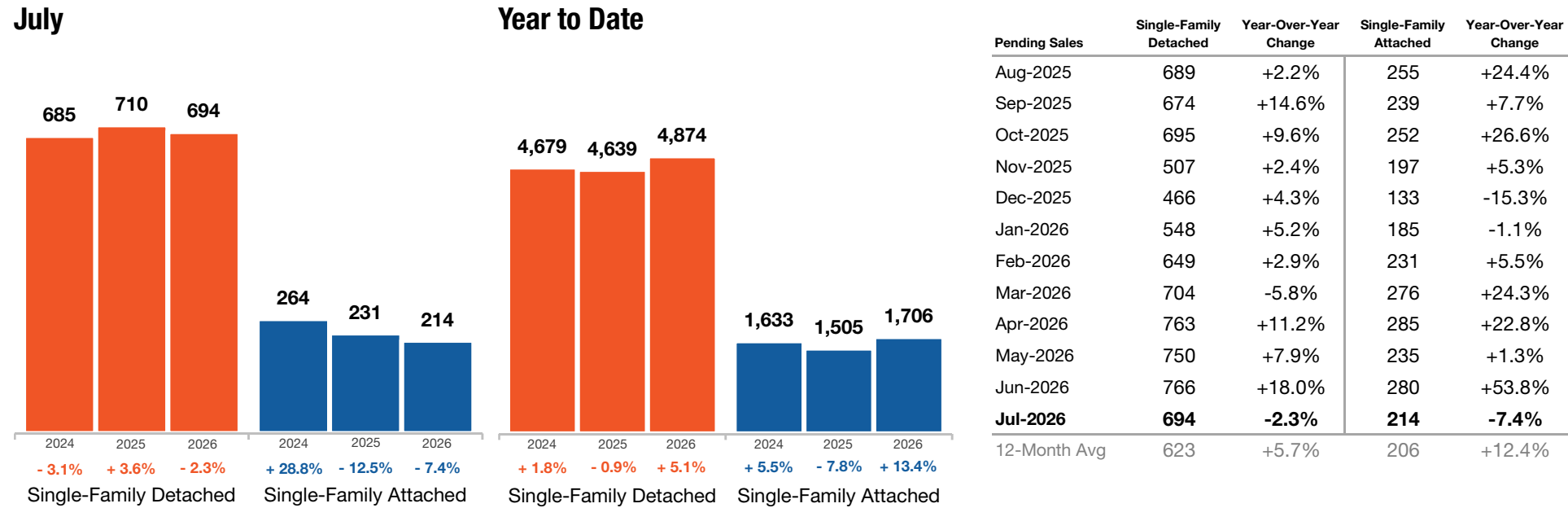
New Listings	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Aug-2025	950	-12.5%	397	+12.8%
Sep-2025	932	+3.7%	365	+14.8%
Oct-2025	939	+5.3%	362	+12.8%
Nov-2025	605	-1.5%	243	+4.7%
Dec-2025	494	+8.8%	189	+21.2%
Jan-2026	949	-6.9%	374	+1.4%
Feb-2026	865	-10.5%	380	+13.8%
Mar-2026	1,058	-8.7%	482	+6.2%
Apr-2026	1,200	-2.2%	433	+6.1%
May-2026	1,046	-14.5%	436	+3.3%
Jun-2026	1,035	-9.4%	394	-6.9%
Jul-2026	872	-23.7%	385	-14.8%
12-Month Avg	912	-7.4%	370	+4.7%

Historical New Listings by Month



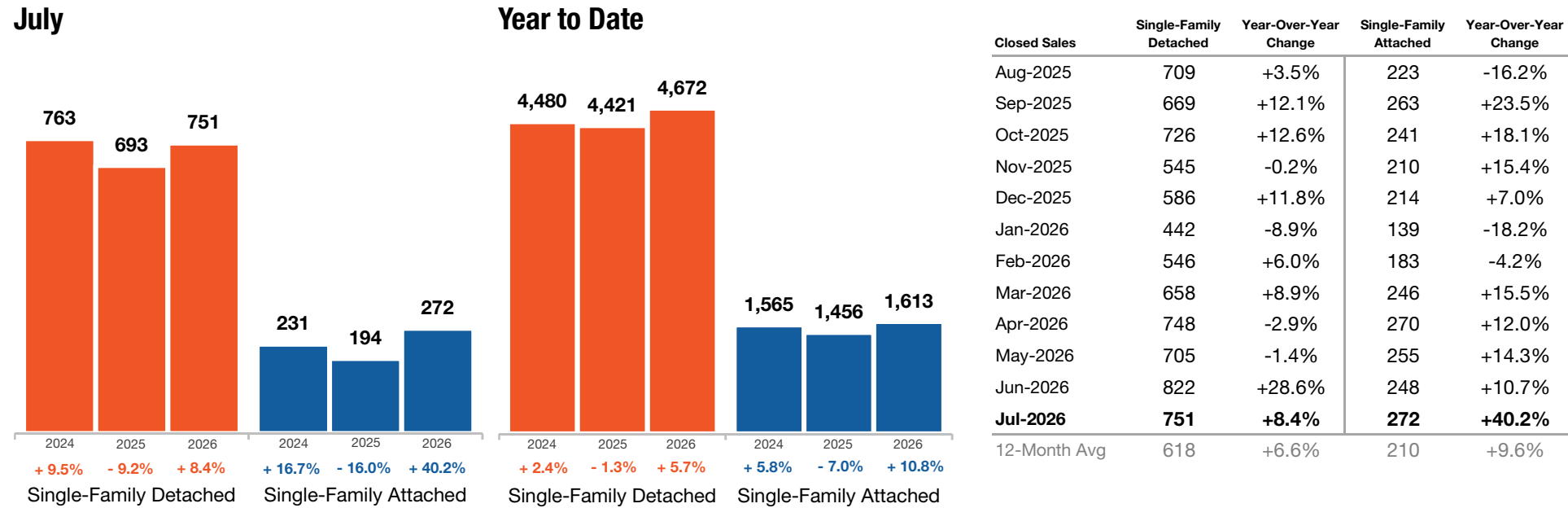
Pending Sales

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



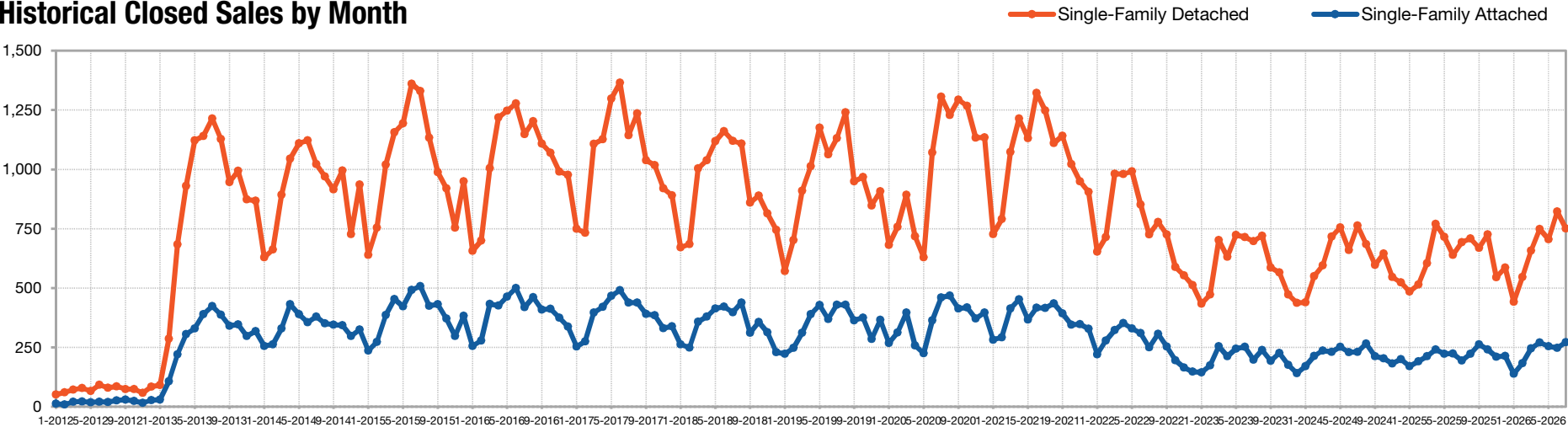
Closed Sales

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



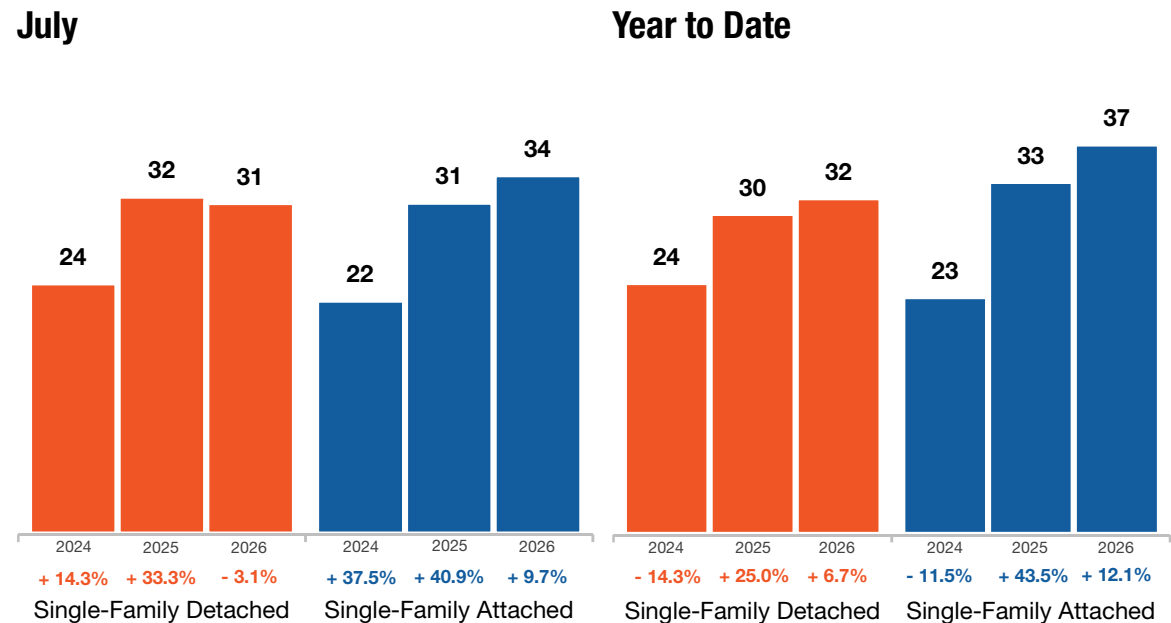
	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Aug-2025	709	+3.5%	223	-16.2%
Sep-2025	669	+12.1%	263	+23.5%
Oct-2025	726	+12.6%	241	+18.1%
Nov-2025	545	-0.2%	210	+15.4%
Dec-2025	586	+11.8%	214	+7.0%
Jan-2026	442	-8.9%	139	-18.2%
Feb-2026	546	+6.0%	183	-4.2%
Mar-2026	658	+8.9%	246	+15.5%
Apr-2026	748	-2.9%	270	+12.0%
May-2026	705	-1.4%	255	+14.3%
Jun-2026	822	+28.6%	248	+10.7%
Jul-2026	751	+8.4%	272	+40.2%
12-Month Avg	618	+6.6%	210	+9.6%

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.



23

33

37

2024

2025

2026

- 11.5%

+ 43.5%

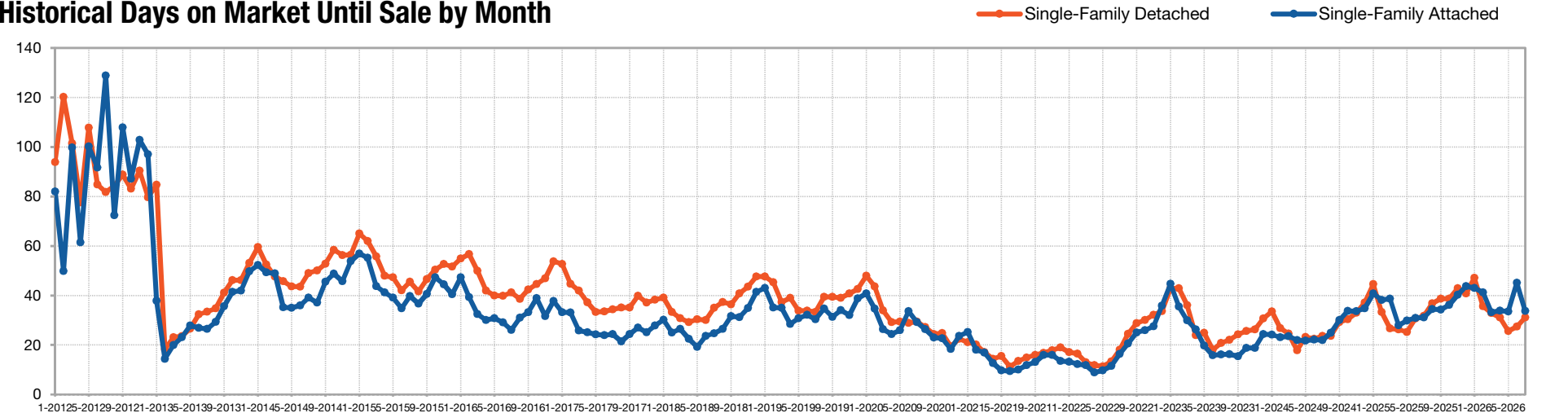
+ 12.1%

Single-Family Attached

Days on Market	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Aug-2025	37	+54.2%	34	+36.0%
Sep-2025	39	+34.5%	34	+13.3%
Oct-2025	39	+30.0%	36	+5.9%
Nov-2025	43	+30.3%	40	+17.6%
Dec-2025	41	+10.8%	44	+25.7%
Jan-2026	47	+4.4%	43	+4.9%
Feb-2026	36	+9.1%	41	+7.9%
Mar-2026	33	+22.2%	33	-15.4%
Apr-2026	31	+19.2%	34	+21.4%
May-2026	26	+4.0%	34	+13.3%
Jun-2026	27	-12.9%	45	+45.2%
Jul-2026	31	-3.1%	34	+9.7%
12-Month Avg*	30	+15.1%	32	+14.8%

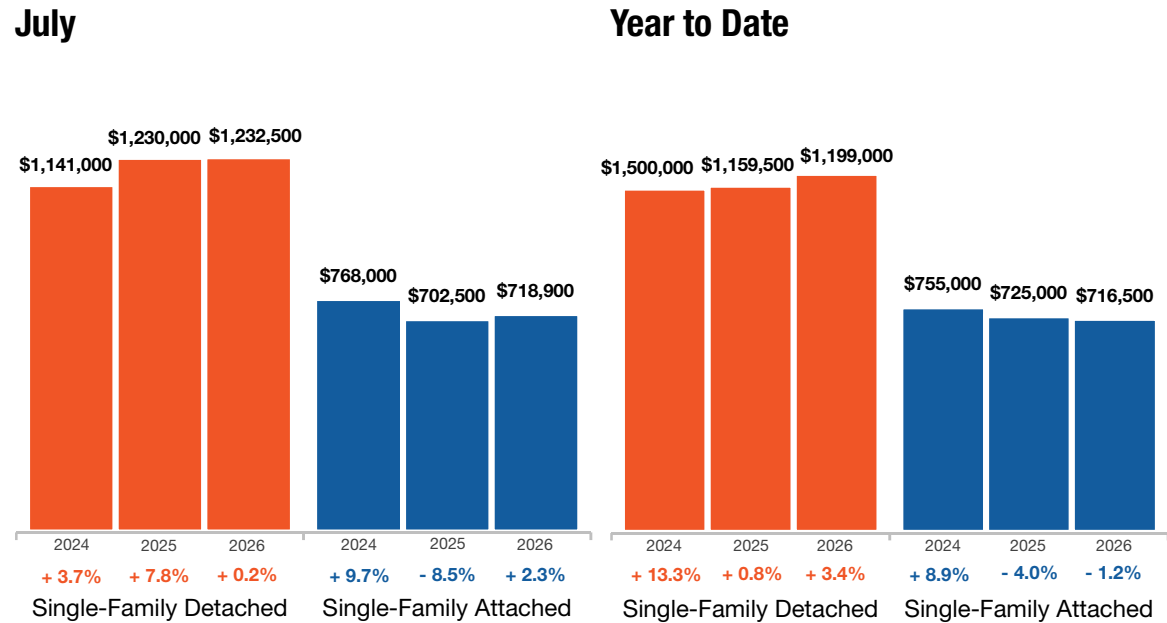
* Days on Market for all properties from August 2025 through July 2026. This is not the average of the individual figures above.

Historical Days on Market Until Sale by Month



Median Sales Price

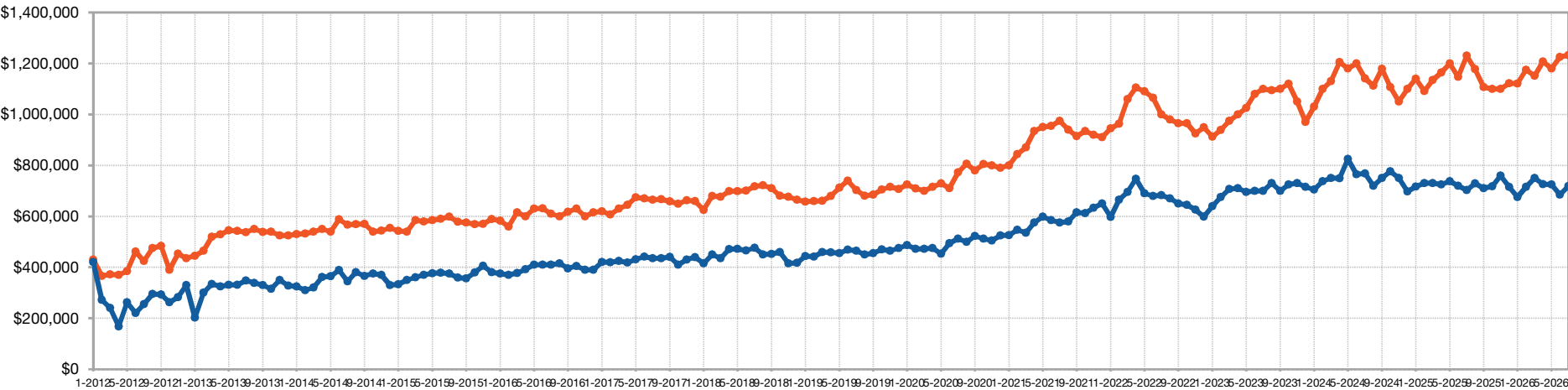
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



Median Sales Price	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Aug-2025	\$1,177,500	+5.8%	\$729,000	+1.3%
Sep-2025	\$1,107,000	-6.1%	\$710,000	-5.3%
Oct-2025	\$1,100,000	-0.7%	\$717,500	-7.7%
Nov-2025	\$1,100,000	+4.8%	\$759,900	+1.3%
Dec-2025	\$1,122,500	+2.0%	\$715,000	+2.6%
Jan-2026	\$1,120,600	-1.7%	\$675,000	-5.8%
Feb-2026	\$1,175,000	+7.7%	\$715,000	-2.1%
Mar-2026	\$1,152,000	+1.5%	\$749,950	+2.7%
Apr-2026	\$1,207,000	+3.7%	\$726,250	+0.2%
May-2026	\$1,180,000	-1.7%	\$725,000	-1.7%
Jun-2026	\$1,225,000	+6.8%	\$685,000	-4.9%
Jul-2026	\$1,232,500	+0.2%	\$718,900	+2.3%
12-Month Avg*	\$1,149,000	+1.4%	\$730,000	-1.4%

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

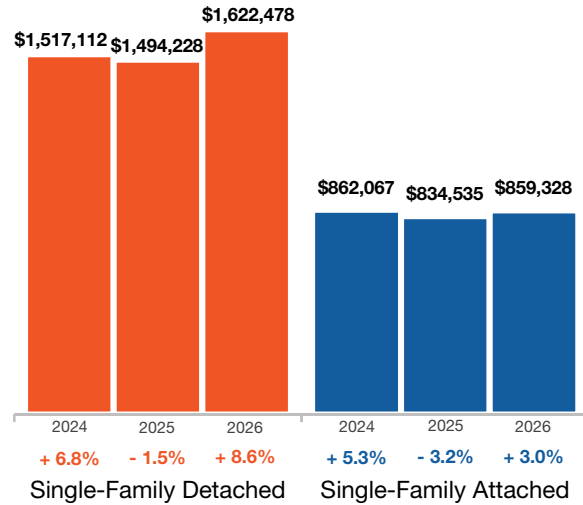
Historical Median Sales Price by Month



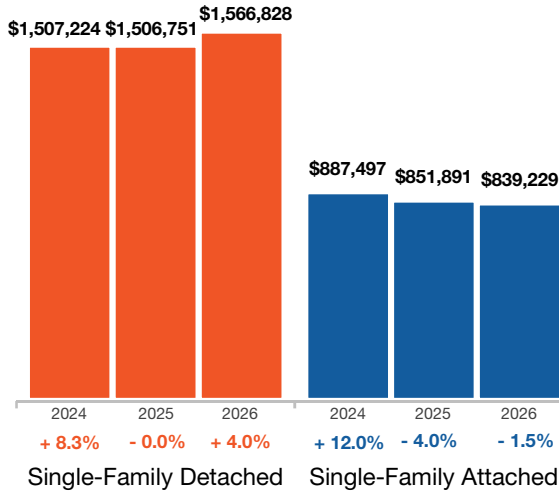
Average Sales Price

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

July



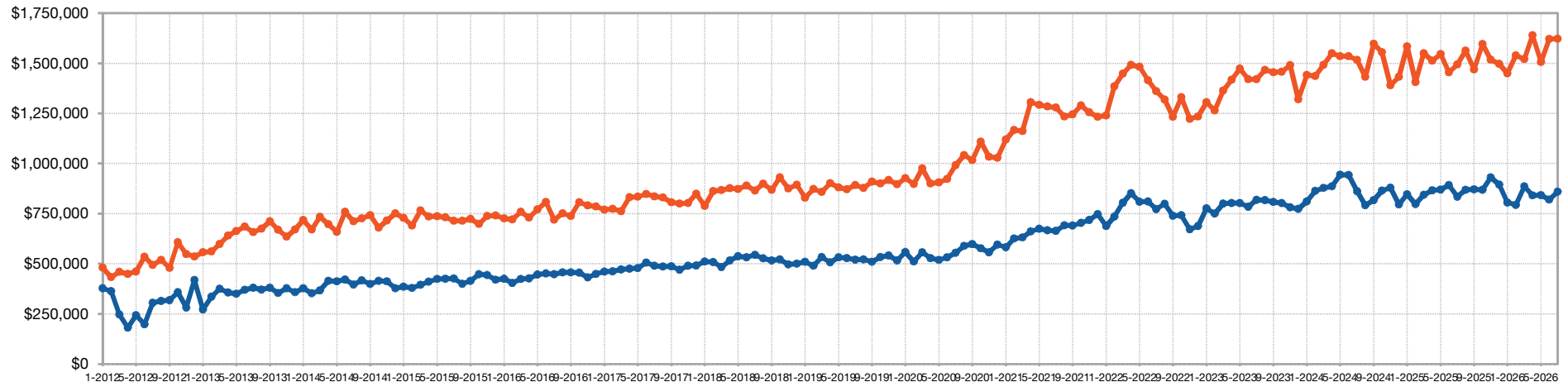
Year to Date



Avg. Sales Price	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Aug-2025	\$1,562,102	+9.1%	\$868,742	+9.6%
Sep-2025	\$1,469,359	-8.0%	\$870,792	+6.5%
Oct-2025	\$1,596,318	+2.7%	\$867,979	+0.4%
Nov-2025	\$1,518,140	+9.2%	\$930,901	+5.8%
Dec-2025	\$1,496,793	+4.5%	\$894,947	+12.5%
Jan-2026	\$1,449,820	-8.4%	\$804,754	-4.9%
Feb-2026	\$1,539,565	+9.5%	\$793,935	-0.4%
Mar-2026	\$1,520,949	-1.8%	\$885,756	+5.0%
Apr-2026	\$1,639,692	+8.4%	\$840,470	-3.0%
May-2026	\$1,505,692	-2.6%	\$841,996	-3.2%
Jun-2026	\$1,620,132	+11.4%	\$819,675	-8.2%
Jul-2026	\$1,622,478	+8.6%	\$859,328	+3.0%
12-Month Avg*	\$1,545,087	+3.7%	\$856,606	+2.0%

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

Historical Average Sales Price by Month

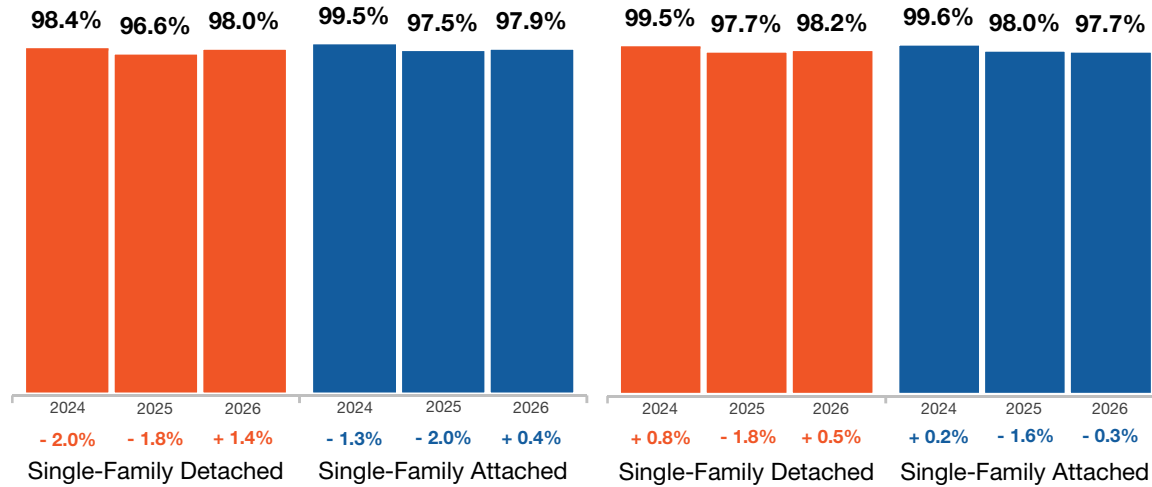


Percent of Original List Price Received

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.

July

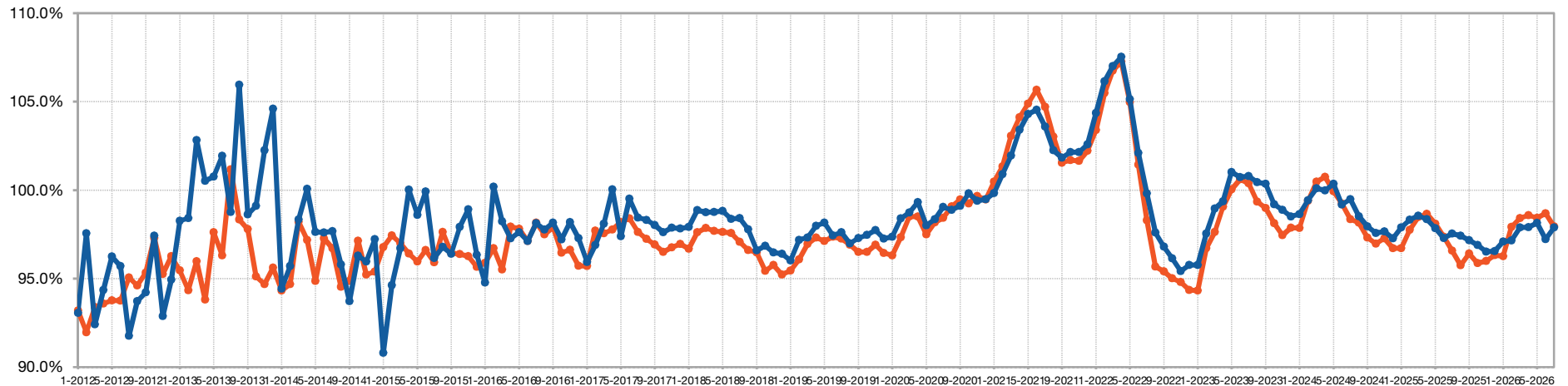
Year to Date



Pct. of Orig. Price Received	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Aug-2025	95.7%	-2.5%	97.4%	-1.1%
Sep-2025	96.4%	-0.9%	97.2%	-0.8%
Oct-2025	95.9%	-1.1%	96.9%	-0.7%
Nov-2025	96.0%	-1.3%	96.5%	-1.2%
Dec-2025	96.3%	-0.4%	96.5%	-0.8%
Jan-2026	96.3%	-0.4%	97.1%	-0.8%
Feb-2026	97.9%	+0.1%	97.2%	-1.1%
Mar-2026	98.4%	-0.1%	97.9%	-0.7%
Apr-2026	98.6%	-0.1%	97.9%	-0.5%
May-2026	98.4%	+0.3%	98.2%	+0.4%
Jun-2026	98.7%	+1.3%	97.2%	-0.1%
Jul-2026	98.0%	+1.4%	97.9%	+0.4%
12-Month Avg*	97.2%	-0.3%	97.3%	-0.6%

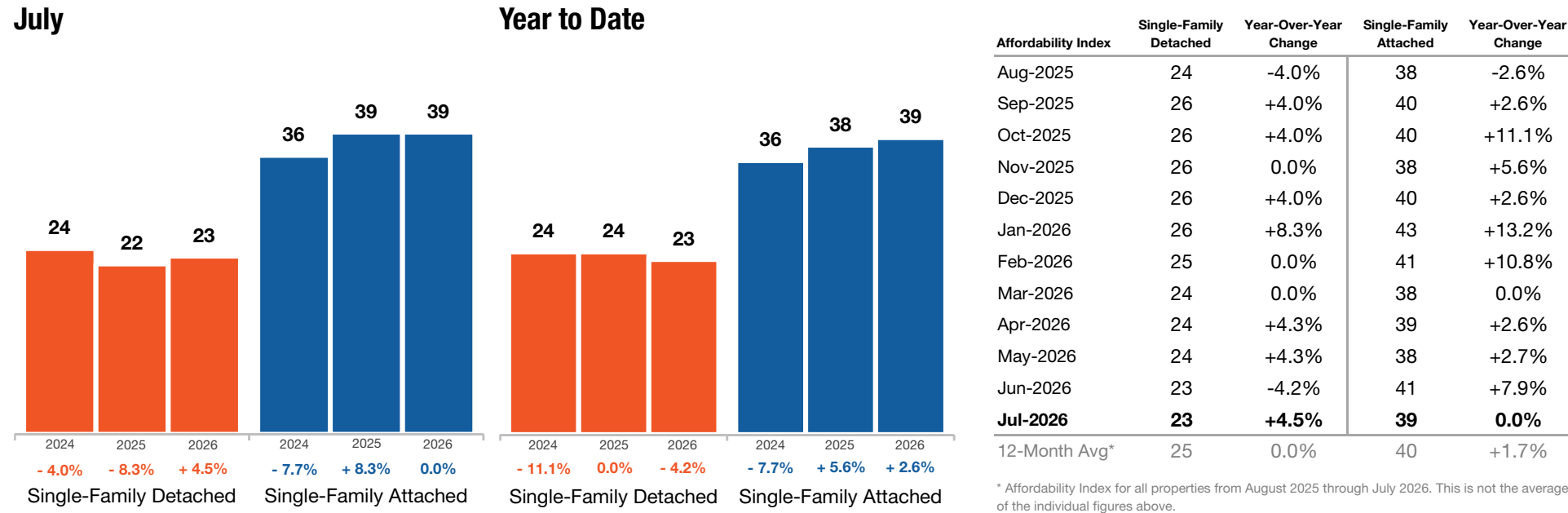
* Pct. of Orig. Price Received for all properties from August 2025 through July 2026. This is not the average of the individual figures above.

Historical Percent of Original List Price Received by Month

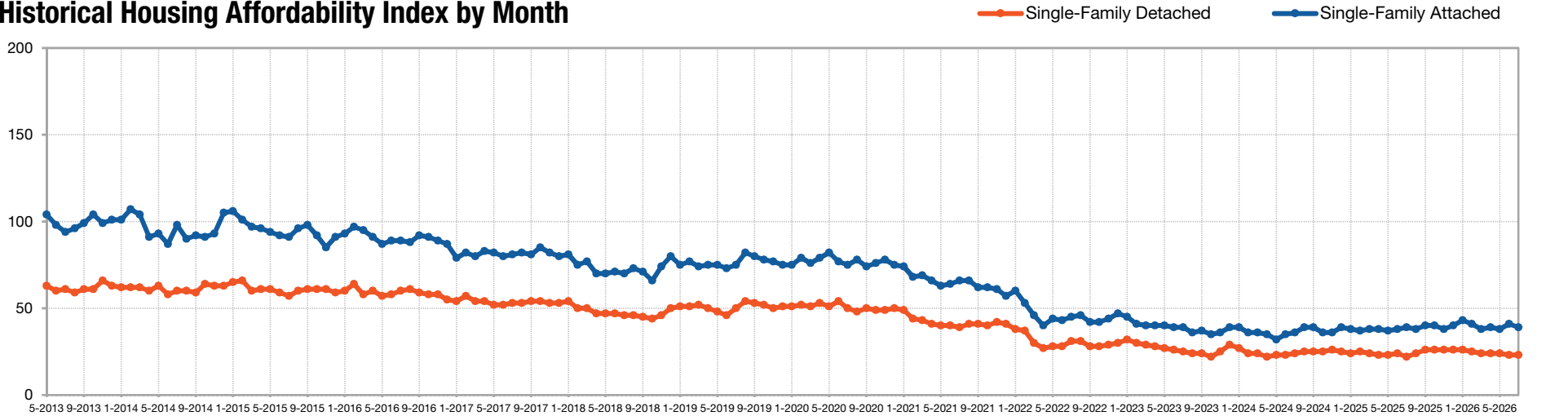


Housing Affordability Index

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.



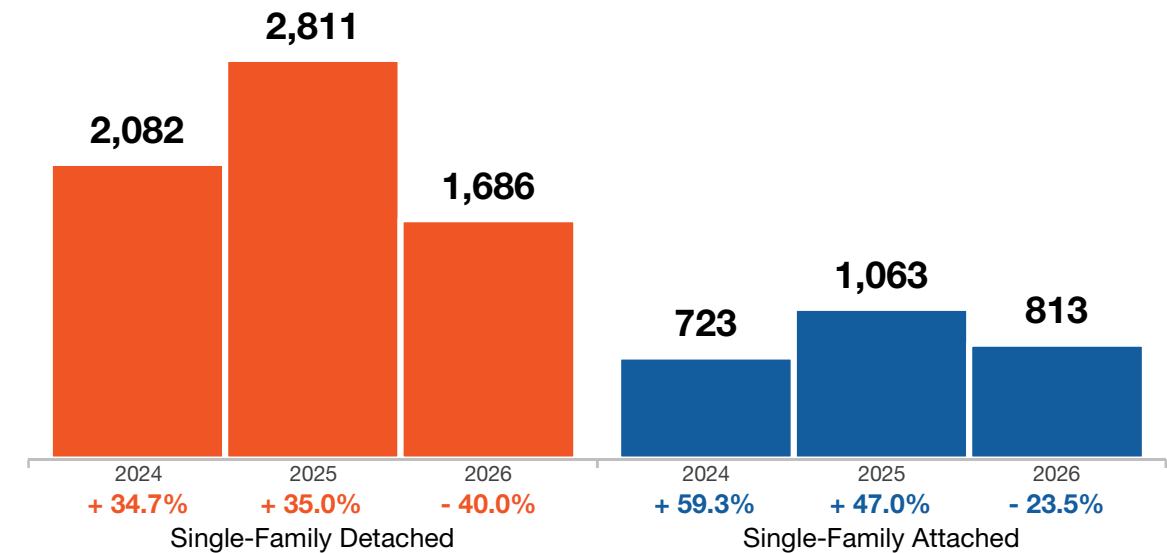
Historical Housing Affordability Index by Month



Inventory of Homes for Sale

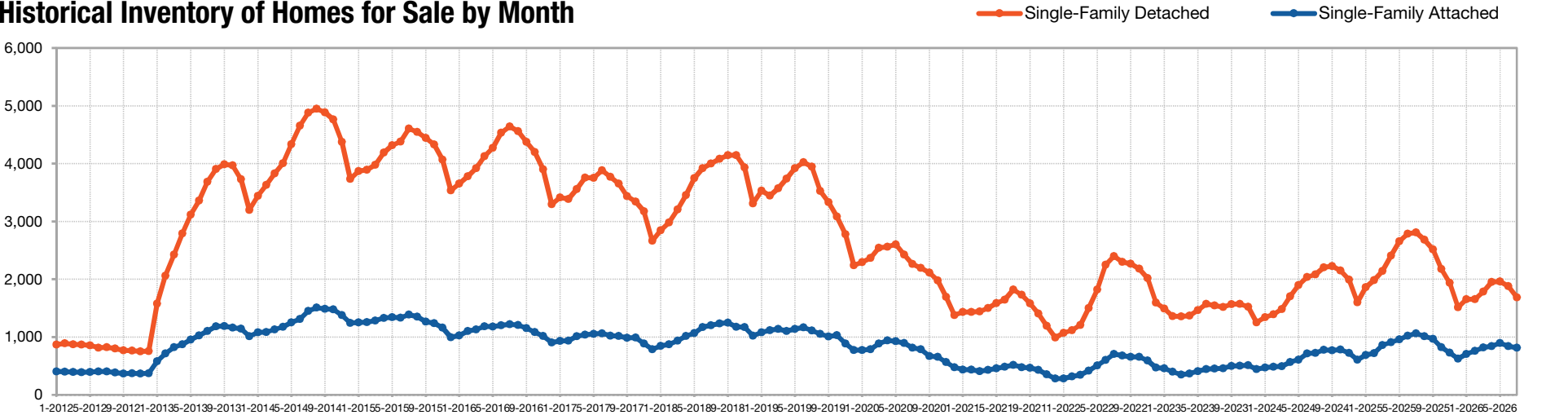
The number of properties available for sale in active status at the end of a given month.

July



Homes for Sale	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Aug-2025	2,681	+21.6%	1,011	+30.1%
Sep-2025	2,517	+13.0%	968	+26.2%
Oct-2025	2,175	+1.1%	823	+5.0%
Nov-2025	1,937	-2.7%	729	+0.7%
Dec-2025	1,515	-5.1%	624	+3.3%
Jan-2026	1,653	-11.1%	706	+2.8%
Feb-2026	1,654	-16.5%	758	+5.1%
Mar-2026	1,782	-16.8%	818	-4.6%
Apr-2026	1,952	-18.9%	842	-7.3%
May-2026	1,961	-26.1%	895	-6.8%
Jun-2026	1,877	-32.6%	839	-17.7%
Jul-2026	1,686	-40.0%	813	-23.5%
12-Month Avg	2,234	-12.8%	823	-0.5%

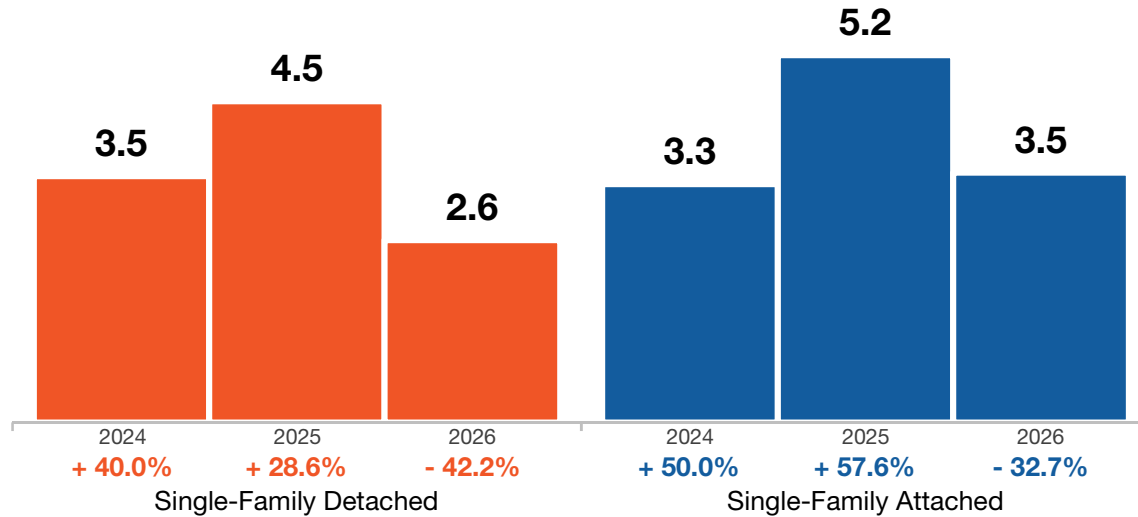
Historical Inventory of Homes for Sale by Month



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.

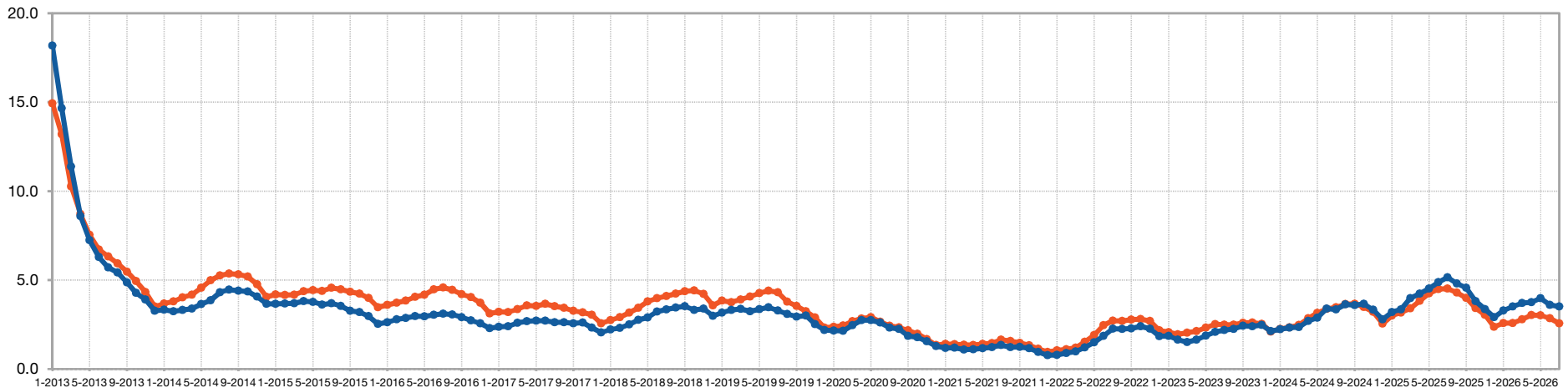
July



Months Supply	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Aug-2025	4.3	+19.4%	4.8	+33.3%
Sep-2025	4.0	+8.1%	4.6	+27.8%
Oct-2025	3.4	-2.9%	3.8	+2.7%
Nov-2025	3.0	-6.3%	3.4	+3.0%
Dec-2025	2.4	-4.0%	2.9	+3.6%
Jan-2026	2.6	-13.3%	3.3	+3.1%
Feb-2026	2.6	-18.8%	3.5	+6.1%
Mar-2026	2.8	-17.6%	3.7	-7.5%
Apr-2026	3.0	-21.1%	3.7	-11.9%
May-2026	3.0	-28.6%	4.0	-11.1%
Jun-2026	2.8	-37.8%	3.6	-26.5%
Jul-2026	2.6	-42.2%	3.5	-32.7%
12-Month Avg*	3.6	-15.5%	3.9	-3.2%

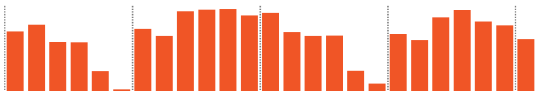
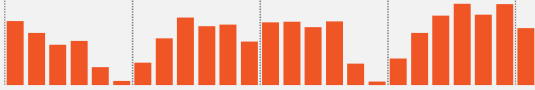
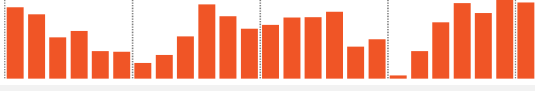
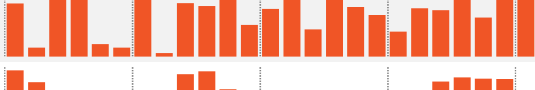
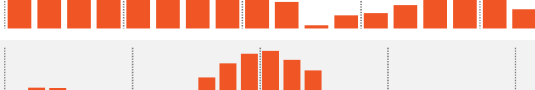
* Months Supply for all properties from August 2025 through July 2026. This is not the average of the individual figures above.

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			7-2025	7-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
	07-2024	07-2025	07-2026						
New Listings				1,596	1,258	- 21.2%	10,751	9,919	- 7.7%
Pending Sales				942	909	- 3.5%	6,149	6,583	+ 7.1%
Closed Sales				887	1,023	+ 15.3%	5,882	6,287	+ 6.9%
Days on Market				32	32	0.0%	31	33	+ 6.5%
Median Sales Price				\$1,097,000	\$1,075,000	- 2.0%	\$1,013,000	\$1,034,225	+ 2.1%
Average Sales Price				\$1,350,784	\$1,419,520	+ 5.1%	\$1,344,702	\$1,379,933	+ 2.6%
Pct. of Orig. Price Received				96.8%	97.9%	+ 1.1%	97.8%	98.0%	+ 0.2%
Housing Affordability Index				25	26	+ 4.0%	27	27	0.0%
Inventory of Homes for Sale				3,905	2,507	- 35.8%	--	--	--
Months Supply of Inventory				4.7	2.8	- 40.4%	--	--	--