Monthly Indicators



August 2025

U.S. existing-home sales rose 2.0% month-over-month and 0.8% year-over-year to a seasonally adjusted annual rate of 4.01 million units, according to the National Association of REALTORS® (NAR). Economists polled by Reuters had forecast a rate of 3.92 million units. Regionally, sales increased on a monthly basis in the West, South, and Northeast, but declined in the Midwest.

Closed Sales increased 3.0 percent for Detached homes but decreased 22.2 percent for Attached homes. Pending Sales decreased 4.3 percent for Detached homes but increased 17.2 percent for Attached homes.

The Median Sales Price was up 4.8 percent to \$1,210,000 for Detached homes and 1.2 percent to \$730,000 for Attached homes. Days on Market increased 50.0 percent for Detached homes and 50.0 percent for Attached homes. Supply decreased 2.9 percent for Detached homes but increased 12.9 percent for Attached homes.

Nationally, 1.55 million units were listed for sale heading into August, up 0.6% from the previous month and 15.7% higher than the same time last year, representing a 4.6-month supply at the current sales pace, according to NAR. Inventory is now at its highest level since May 2020, a shift that has helped slow price growth in many markets. As a result, the national median existinghome sales price edged up just 0.2% year-over-year to \$422,400.

Monthly Snapshot

\$1,210,000 \$730,000 \$1,025,000

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

NORTH SAN DIEGO COUNTY REALTORS

HOMEDEX

Market Statistics

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 08-2023 08-2024 08-2025	8-2024	8-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
New Listings		1,024	806	- 21.3%	7,469	8,151	+ 9.1%
Pending Sales		634	607	- 4.3%	5,012	4,964	- 1.0%
Closed Sales		632	651	+ 3.0%	4,826	4,777	- 1.0%
Days on Market		24	36	+ 50.0%	24	32	+ 33.3%
Median Sales Price		\$1,155,000	\$1,210,000	+ 4.8%	\$1,178,500	\$1,200,000	+ 1.8%
Average Sales Price		\$1,479,433	\$1,598,561	+ 8.1%	\$1,537,875	\$1,558,655	+ 1.4%
Pct. of Orig. Price Received		98.1%	95.8%	- 2.3%	99.4%	97.5%	- 1.9%
Housing Affordability Index		24	23	- 4.2%	24	23	- 4.2%
Inventory of Homes for Sale		1,934	1,936	+ 0.1%			
Months Supply of Inventory		3.4	3.3	- 2.9%			

Single-Family Attached Activity Overview



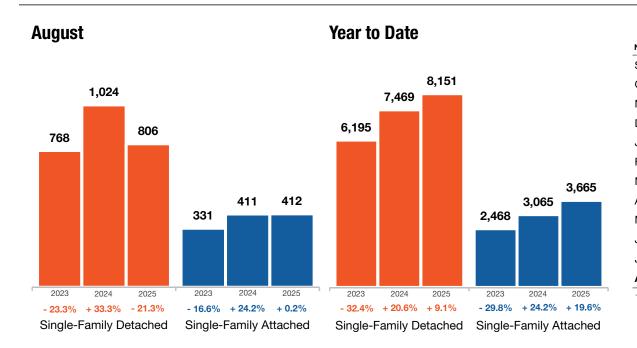
Key metrics by report month and for year-to-date (YTD) starting from the first of the year. Attached homes only.

Key Metrics	Historical Sparkbars 08-2023 08-2024 08-2025	8-2024	8-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
New Listings		411	412	+ 0.2%	3,065	3,665	+ 19.6%
Pending Sales		244	286	+ 17.2%	2,158	2,076	- 3.8%
Closed Sales		315	245	- 22.2%	2,148	1,970	- 8.3%
Days on Market		24	36	+ 50.0%	23	33	+ 43.5%
Median Sales Price		\$721,000	\$730,000	+ 1.2%	\$749,990	\$729,000	- 2.8%
Average Sales Price		\$807,383	\$854,739	+ 5.9%	\$878,659	\$854,902	- 2.7%
Pct. of Orig. Price Received		98.5%	96.7%	- 1.8%	99.4%	97.8%	- 1.6%
Housing Affordability Index		39	38	- 2.6%	37	38	+ 2.7%
Inventory of Homes for Sale		785	855	+ 8.9%			
Months Supply of Inventory		3.1	3.5	+ 12.9%			

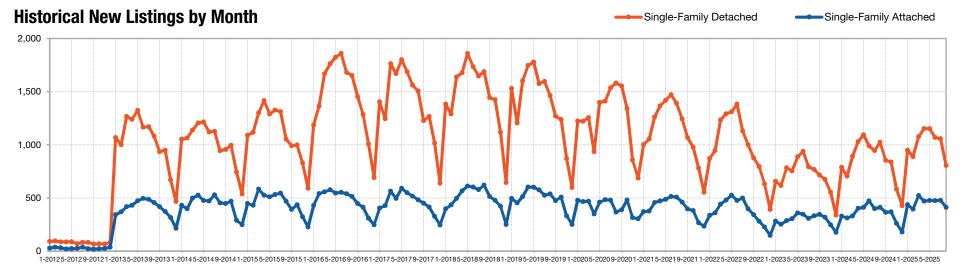
New Listings

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





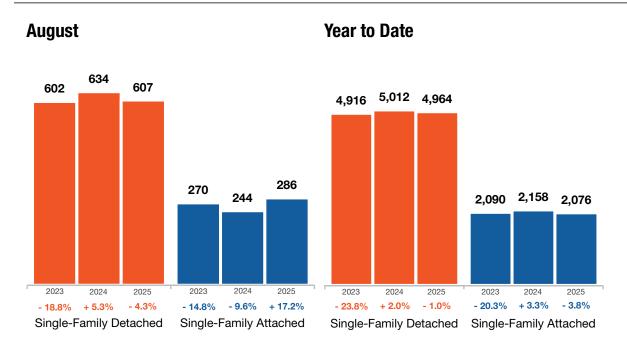
New Listings	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Sep-2024	854	+19.4%	364	+5.5%
Oct-2024	839	+24.5%	369	+16.0%
Nov-2024	583	+5.2%	260	+5.3%
Dec-2024	426	+25.7%	180	+2.3%
Jan-2025	949	+20.6%	437	+33.2%
Feb-2025	889	+26.1%	395	+26.6%
Mar-2025	1,077	+20.7%	522	+58.2%
Apr-2025	1,152	+11.8%	470	+16.9%
May-2025	1,152	+5.3%	476	+15.5%
Jun-2025	1,069	+7.9%	475	+0.8%
Jul-2025	1,057	+11.7%	478	+19.8%
Aug-2025	806	-21.3%	412	+0.2%
12-Month Avg	904	+11.3%	403	+16.6%



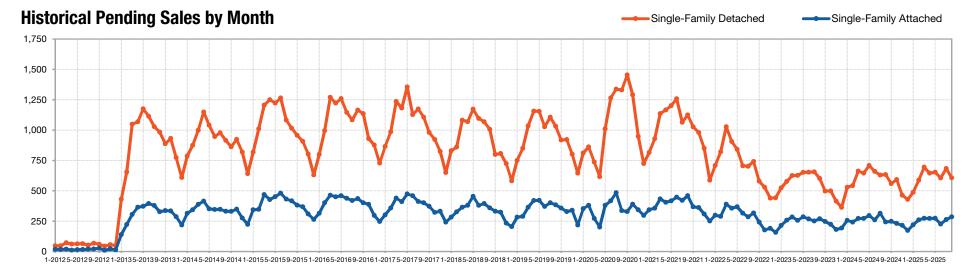
Pending Sales

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





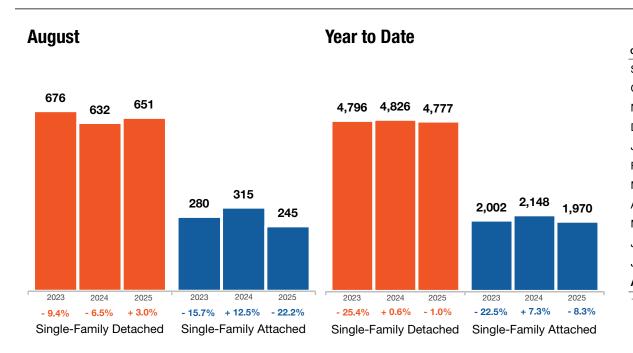
Pending Sales	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Sep-2024	560	+12.4%	249	+0.8%
Oct-2024	593	+18.8%	232	+3.6%
Nov-2024	464	+11.8%	216	+18.7%
Dec-2024	429	+18.2%	173	-10.4%
Jan-2025	487	-8.1%	220	-14.4%
Feb-2025	587	+8.1%	260	+7.4%
Mar-2025	696	+5.1%	274	+0.7%
Apr-2025	645	0.0%	273	+0.4%
May-2025	653	-7.8%	274	-7.4%
Jun-2025	606	-8.2%	226	-13.1%
Jul-2025	683	+8.4%	263	-16.5%
Aug-2025	607	-4.3%	286	+17.2%
12-Month Avg	566	+3.3%	250	-1.9%



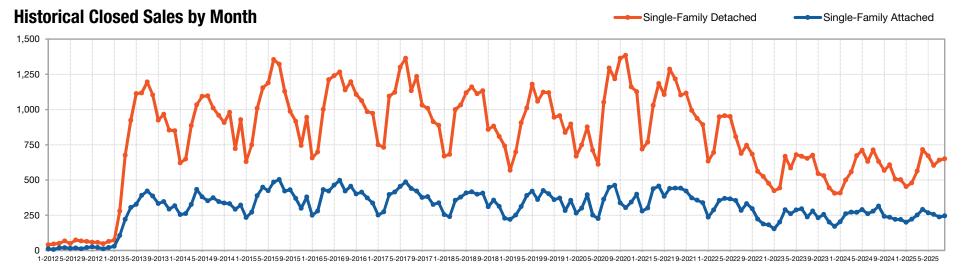
Closed Sales

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





Closed Sales	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Sep-2024	568	+4.2%	242	+4.3%
Oct-2024	608	+14.5%	235	-8.2%
Nov-2024	506	+14.0%	220	+9.5%
Dec-2024	502	+24.0%	219	+28.8%
Jan-2025	453	+11.0%	200	-1.5%
Feb-2025	479	-4.2%	222	-14.6%
Mar-2025	563	+0.9%	251	-7.7%
Apr-2025	716	+6.5%	291	+7.8%
May-2025	671	-5.6%	267	-7.9%
Jun-2025	603	-4.6%	256	-1.5%
Jul-2025	641	-10.1%	238	-14.4%
Aug-2025	651	+3.0%	245	-22.2%
12-Month Avg	563	+3.1%	251	-4.0%



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.



August	İ		Year to Date										
		36			36				32			33	
							28						
	0.4			24				24		24	23		
22	24			24									
			17										
2023	2024	2025	2023	2024	2025		2023	2024	2025	2023	2024	2025	٦
- 8.3%	+ 9.1%	+ 50.0%	- 22.7%	+ 41.2%	+ 50.0%				+ 33.3%	+ 84.6%		+ 43.5%	
Single-F	amily D	etached	Single-	Family A	ttached		Single-F	amily D	etached	Single-I	Family A	ttached	

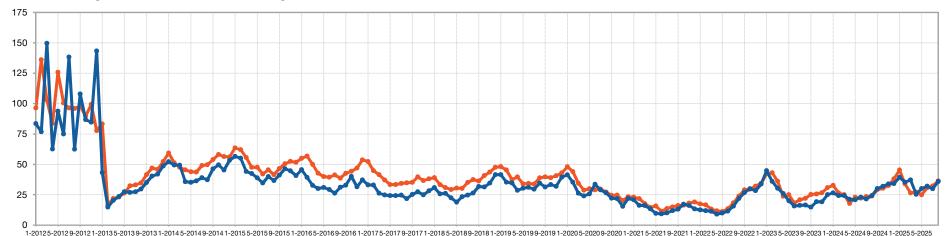
Days on Market	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Sep-2024	29	+16.0%	30	+100.0%
Oct-2024	30	+15.4%	32	+68.4%
Nov-2024	33	+22.2%	34	+78.9%
Dec-2024	38	+22.6%	34	+36.0%
Jan-2025	45	+36.4%	39	+50.0%
Feb-2025	34	+25.9%	35	+45.8%
Mar-2025	27	+8.0%	37	+54.2%
Apr-2025	27	+50.0%	25	+19.0%
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%
12-Month Avg*	25	+29.0%	22	+48.6%

^{*} Days on Market for all properties from September 2024 through August 2025. This is not the average of the individual figures above.

Historical Days on Market Until Sale by Month







Median Sales Price





August	Year to Date				
\$1,210,000 \$1,127,150 \$1,155,000	\$1,178,500 \$1,200,000 \$1,050,000 \$723,750 \$721,000 \$730,000 \$693,000 \$749,990 \$729,000				
2023 2024 2025	2023 2024 2025 2023 2024 2025 2023 2024 2025				
+ 14.0% + 2.5% + 4.8%	+ 7.6% - 0.4% + 1.2% 0.0% + 12.2% + 1.8% + 1.2% + 8.2% - 2.8%				
Single-Family Detached	Single-Family Attached Single-Family Detached Single-Family Attached				

Median Sales Price	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Sep-2024	\$1,200,000	+7.8%	\$750,000	+5.3%
Oct-2024	\$1,150,000	0.0%	\$770,000	+5.8%
Nov-2024	\$1,080,000	-0.4%	\$746,875	-0.7%
Dec-2024	\$1,135,125	+14.2%	\$704,000	-2.4%
Jan-2025	\$1,155,000	+5.0%	\$723,250	+5.6%
Feb-2025	\$1,127,388	+0.9%	\$734,500	-0.7%
Mar-2025	\$1,162,000	-0.1%	\$720,000	-4.0%
Apr-2025	\$1,200,000	-4.0%	\$735,000	-0.7%
May-2025	\$1,250,000	+4.6%	\$744,500	-10.0%
Jun-2025	\$1,167,500	-5.1%	\$719,950	-5.9%
Jul-2025	\$1,250,000	+8.2%	\$720,000	-5.2%
Aug-2025	\$1,210,000	+4.8%	\$730,000	+1.2%
12-Month Avg*	\$1,150,000	+2.4%	\$740,000	-0.7%

^{*} Median Sales Price for all properties from September 2024 through August 2025. This is not the average of the individual figures above.

Historical Median Sales Price by Month Single-Family Detached Single-Family Attached \$1,400,000 \$1,200,000 \$1,000,000 \$800,000 \$600,000 \$400,000 1-20125-20129-20121-20135-20139-20131-20145-20149-20141-20155-20159-20151-20165-20169-20161-20175-20179-20171-20185-20189-20181-20195-20199-20191-20205-20209-20201-20215-20219-20211-20225-20229-20221-20235-20239-20231-20245-20249-20241-20255-2025

Average Sales Price

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

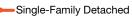


August	Year to Date
\$1,598,561 \$1,481,252 \$1,479,433	\$1,537,875 \$1,558,655 \$1,433,078 \$827,927 \$807,383 \$854,739 \$801,206 \$878,659 \$854,902
2023 2024 2025	2023 2024 2025 2023 2024 2025 2023 2024 2025
+ 11.0% - 0.1% + 8.1%	+2.3% -2.5% +5.9% +0.7% +7.3% +1.4% -0.0% +9.7% -2.7%
Single-Family Detached	Single-Family Attached Single-Family Detached Single-Family Attached

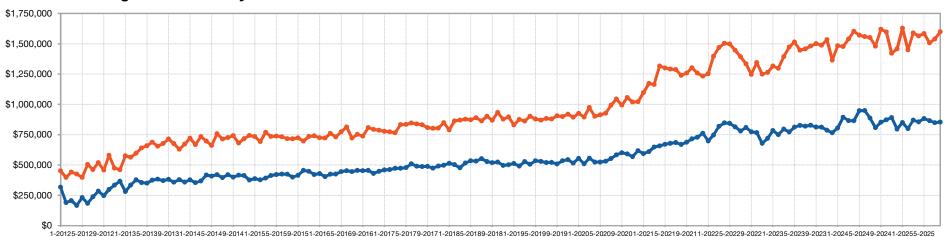
Avg. Sales Price	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Sep-2024	\$1,619,408	+7.9%	\$852,586	+4.9%
Oct-2024	\$1,596,588	+7.4%	\$872,774	+7.5%
Nov-2024	\$1,422,003	-7.2%	\$891,534	+13.3%
Dec-2024	\$1,457,768	+6.8%	\$795,898	+4.0%
Jan-2025	\$1,629,003	+9.8%	\$849,772	+5.5%
Feb-2025	\$1,449,533	-1.8%	\$800,458	-10.4%
Mar-2025	\$1,588,619	+3.2%	\$870,455	+0.6%
Apr-2025	\$1,564,629	-2.3%	\$855,889	-1.1%
May-2025	\$1,584,046	+0.8%	\$883,688	-6.8%
Jun-2025	\$1,507,506	-3.3%	\$865,333	-8.8%
Jul-2025	\$1,538,295	-0.8%	\$849,118	-4.3%
Aug-2025	\$1,598,561	+8.1%	\$854,739	+5.9%
12-Month Avg*	\$1,546,330	+1.9%	\$853,520	-0.1%

^{*} Avg. Sales Price for all properties from September 2024 through August 2025. This is not the average of the individual figures above.

Historical Average Sales Price by Month







Percent of Original List Price Received



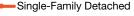
Percentage found when dividing a property's sales price by its original list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.

August	gust Year to Date						
99.3% 98.1% 95.8%	100.5% 98.5% 96.7% 98.8% 99.4% 97.5% 99.6% 99.4% 97.8%						
2023 2024 2025 + 3.8% - 1.2% - 2.3%	2023 2024 2025 2023 2024 2025 +3.0% -2.0% -1.8% -4.3% +0.6% -1.9% -4.1% -0.2% -1.6%	1					
Single-Family Detached	Single-Family Attached Single-Family Detached Single-Family Attached						

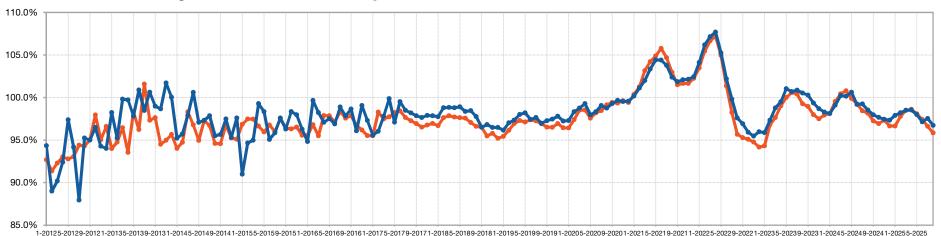
Pct. of Orig. Price Received	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Sep-2024	97.2%	-1.7%	98.0%	-2.3%
Oct-2024	96.9%	-1.1%	97.7%	-1.7%
Nov-2024	97.3%	-0.2%	97.4%	-1.3%
Dec-2024	96.7%	-1.2%	97.3%	-1.0%
Jan-2025	96.6%	-1.5%	97.9%	-0.2%
Feb-2025	97.8%	-1.7%	98.2%	-0.9%
Mar-2025	98.5%	-1.9%	98.5%	-1.7%
Apr-2025	98.6%	-2.2%	98.5%	-1.6%
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	95.8%	-2.3%	96.7%	-1.8%
12-Month Avg*	97.3%	-1.7%	97.7%	-1.6%

^{*} Pct. of Orig. Price Received for all properties from September 2024 through August 2025. This is not the average of the individual figures above.

Historical Percent of Original List Price Received by Month







Housing Affordability Index



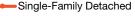
This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.

August		Year to Date	
	39 39		3838
	36 38		
•		25 24 23	
23 24 23			
2023 2024 2025	2023 2024 2025	2023 2024 2025	2023 2024 2025
- 25.8% + 4.3% - 4.2%	- 20.0% + 8.3% - 2.6%	- 13.8% - 4.0% - 4.2%	- 15.6% - 2.6% + 2.7%
Single-Family Detached	Single-Family Attached	Single-Family Detached	Single-Family Attached

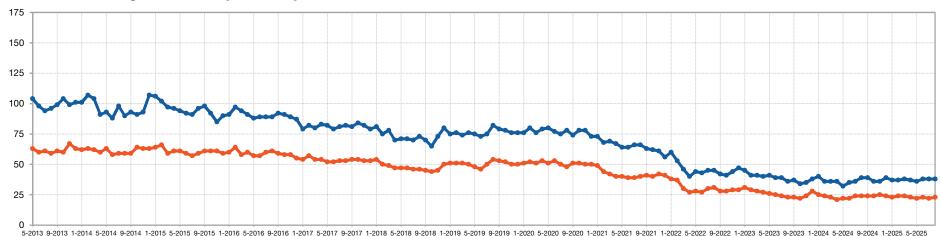
Affordability Index	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Sep-2024	24	+4.3%	39	+5.4%
Oct-2024	24	+9.1%	36	+5.9%
Nov-2024	25	+4.2%	36	+2.9%
Dec-2024	24	-14.3%	39	+2.6%
Jan-2025	23	-8.0%	37	-7.5%
Feb-2025	24	0.0%	37	+2.8%
Mar-2025	24	+4.3%	38	+5.6%
Apr-2025	23	+9.5%	37	+2.8%
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%
12-Month Avg*	23	-2.7%	37	-1.7%

 $^{^{\}star}$ Affordability Index for all properties from September 2024 through August 2025. This is not the average of the individual figures above.

Historical Housing Affordability Index by Month



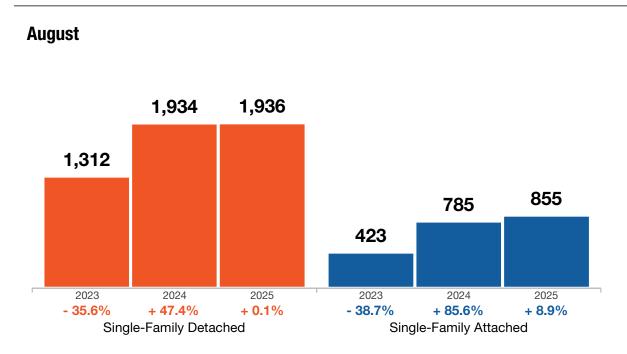




Inventory of Homes for Sale

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





Homes for Sale	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Sep-2024	1,951	+44.5%	784	+66.8%
Oct-2024	1,870	+39.1%	803	+63.2%
Nov-2024	1,715	+32.1%	732	+45.8%
Dec-2024	1,342	+29.4%	586	+40.5%
Jan-2025	1,573	+38.1%	691	+58.5%
Feb-2025	1,665	+41.6%	735	+60.1%
Mar-2025	1,801	+42.3%	869	+84.9%
Apr-2025	2,032	+37.1%	922	+68.9%
May-2025	2,228	+33.5%	961	+62.3%
Jun-2025	2,295	+29.0%	992	+36.5%
Jul-2025	2,200	+20.4%	989	+37.0%
Aug-2025	1,936	+0.1%	855	+8.9%
12-Month Avg	1,442	+30.7%	552	+49.9%

Historical Inventory of Homes for Sale by Month Single-Family Detached Single-Family Attached 5,000 4,000 3,000 2,000 1,00

Months Supply of Inventory





Au	gust							
		3.4	3.3			3.1	3.5	
	2.3							
					1.8			
	2023	2024	2025	- '	2023	2024	2025	
	- 8.0%	+ 47.8%	- 2.9%		- 14.3%	+ 72.2%	+ 12.9%	
	Singl	le-Family Detac	ched		Sing	le-Family Attac	ched	

Months Supply	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Sep-2024	3.4	+41.7%	3.1	+55.0%
Oct-2024	3.2	+33.3%	3.2	+60.0%
Nov-2024	2.9	+26.1%	2.9	+38.1%
Dec-2024	2.3	+21.1%	2.3	+35.3%
Jan-2025	2.7	+35.0%	2.8	+55.6%
Feb-2025	2.8	+33.3%	2.9	+52.6%
Mar-2025	3.0	+30.4%	3.5	+84.2%
Apr-2025	3.4	+30.8%	3.7	+68.2%
May-2025	3.8	+26.7%	3.9	+62.5%
Jun-2025	3.9	+25.8%	4.0	+37.9%
Jul-2025	3.8	+18.8%	4.1	+41.4%
Aug-2025	3.3	-2.9%	3.5	+12.9%
12-Month Avg*	2.6	+25.8%	2.2	+48.4%

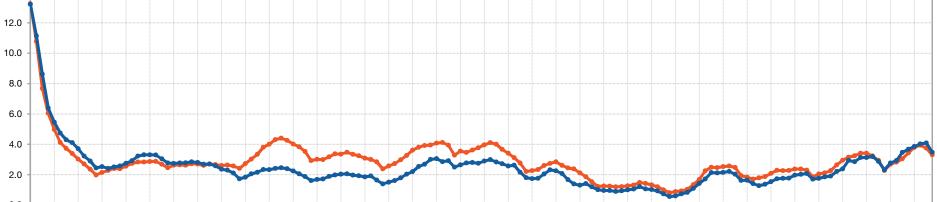
^{*} Months Supply for all properties from September 2024 through August 2025. This is not the average of the individual figures above.

Single-Family Detached

Single-Family Attached

Historical Months Supply of Inventory by Month





-1-2013 5-2013 9-2013 1-2014 5-2014 9-2014 1-2015 5-2015 9-2015 1-2016 5-2016 9-2016 1-2017 5-2017 9-2017 1-2018 5-2018 9-2018 1-2019 5-2019 9-2019 1-2020 5-2020 9-2020 1-2021 5-2021 9-2021 1-2022 5-2022 9-2022 1-2023 5-2023 5-2023 9-2023 1-2024 5-2024 9-2024 1-2025 5-2025

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 08-2023 08-2024 08-202	8-2024	8-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
New Listings	<u></u>	1,441	1,219	- 15.4%	10,570	11,836	+ 12.0%
Pending Sales		880	893	+ 1.5%	7,192	7,048	- 2.0%
Closed Sales		950	896	- 5.7%	6,996	6,759	- 3.4%
Days on Market		24	36	+ 50.0%	24	32	+ 33.3%
Median Sales Price		\$950,000	\$1,025,000	+ 7.9%	\$1,000,000	\$1,015,000	+ 1.5%
Average Sales Price		\$1,254,682	\$1,394,945	+ 11.2%	\$1,334,375	\$1,352,903	+ 1.4%
Pct. of Orig. Price Received		98.3%	96.1%	- 2.2%	99.4%	97.6%	- 1.8%
Housing Affordability Index		30	27	- 10.0%	28	27	- 3.6%
Inventory of Homes for Sale		2,736	2,797	+ 2.2%			
Months Supply of Inventory		3.3	3.4	+ 3.0%			