

Monthly Indicators



September 2026

U.S. existing-home sales fell 2.0% from the previous month and 1.2% from a year earlier to a seasonally adjusted annual rate of 3.98 million, the first reading below 4 million since June 2025, according to the National Association of REALTORS® (NAR). Sales held steady in the West and declined in the Northeast, Midwest, and South. Compared with a year earlier, sales were unchanged in the South and declined in the Northeast, Midwest, and West.

New Listings were up 19.3 percent to 457. Pending Sales decreased 22.9 percent to 242. Inventory grew 20.9 percent to 1,503 units.

Median Sales Price was up 2.0 percent to \$305,850. Days on Market increased 9.5 percent to 115 days. Months Supply of Inventory was up 25.6 percent to 5.4 months.

Heading into September, there were 1.62 million homes listed for sale, up 3.2% from the previous month and 5.9% from a year earlier, the first time inventory has exceeded 1.6 million units since November 2019, NAR reported. That represents a 4.9-month supply at the current sales pace, up from 4.6 months a month earlier and the highest level in over ten years, according to NAR Chief Economist Lawrence Yun. The median existing-home sales price rose 1.6% year-over-year to \$429,100, marking 38 consecutive months of annual gains, and year-to-date sales are up 1.6%. The Federal Reserve raised its benchmark rate by a quarter point on September 16 to a range of 3.75% to 4%, its first increase since July 2023, and the 30-year fixed-rate mortgage moved above 7% in late September, up from an August average of 6.67%, according to Freddie Mac.

Quick Facts

- 13.0%	+ 2.0%	+ 25.6%
One-Year Change in Closed Sales	One-Year Change in Median Sales Price	One-Year Change in Months Supply

A research tool provided by the Aiken Association of REALTORS®. Percent changes are calculated using rounded figures.

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Market Overview

Key market metrics for the current month and year-to-date figures.



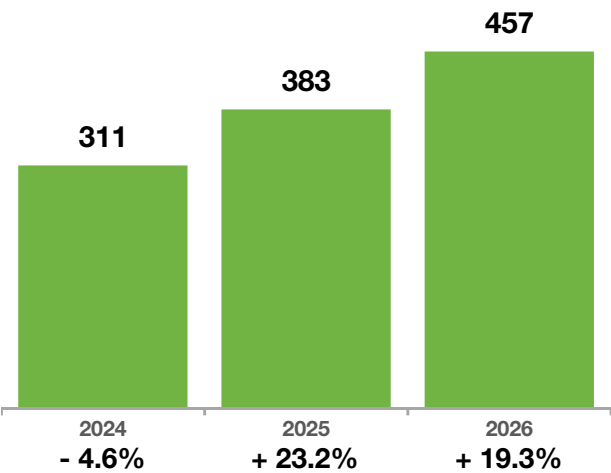
Key Metrics	Historical Sparkbars			09-2025	09-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
	09-2024	09-2025	09-2026						
New Listings				383	457	+ 19.3%	3,560	3,698	+ 3.9%
Pending Sales				314	242	- 22.9%	2,759	2,566	- 7.0%
Closed Sales				307	267	- 13.0%	2,638	2,562	- 2.9%
Days on Market				105	115	+ 9.5%	110	118	+ 7.3%
Median Sales Price				\$300,000	\$305,850	+ 2.0%	\$297,015	\$308,750	+ 4.0%
Average Sales Price				\$363,305	\$353,980	- 2.6%	\$342,598	\$359,202	+ 4.8%
Pct. of List Price Received				98.2%	97.8%	- 0.4%	98.4%	98.1%	- 0.3%
Housing Affordability Index				105	98	- 6.7%	106	97	- 8.5%
Inventory of Homes for Sale				1,243	1,503	+ 20.9%	--	--	--
Months Supply of Inventory				4.3	5.4	+ 25.6%	--	--	--

New Listings

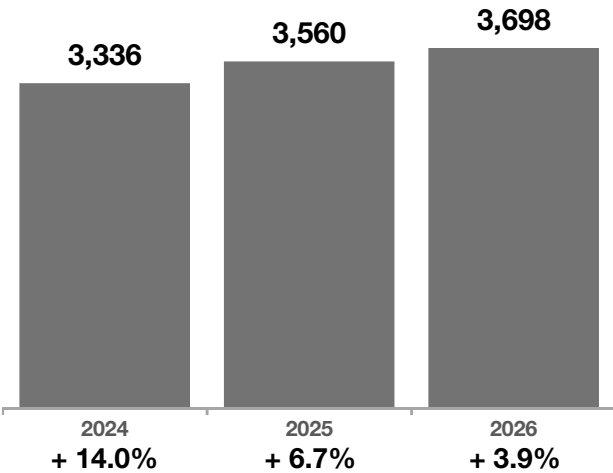
A count of the properties that have been newly listed on the market in a given month.



September

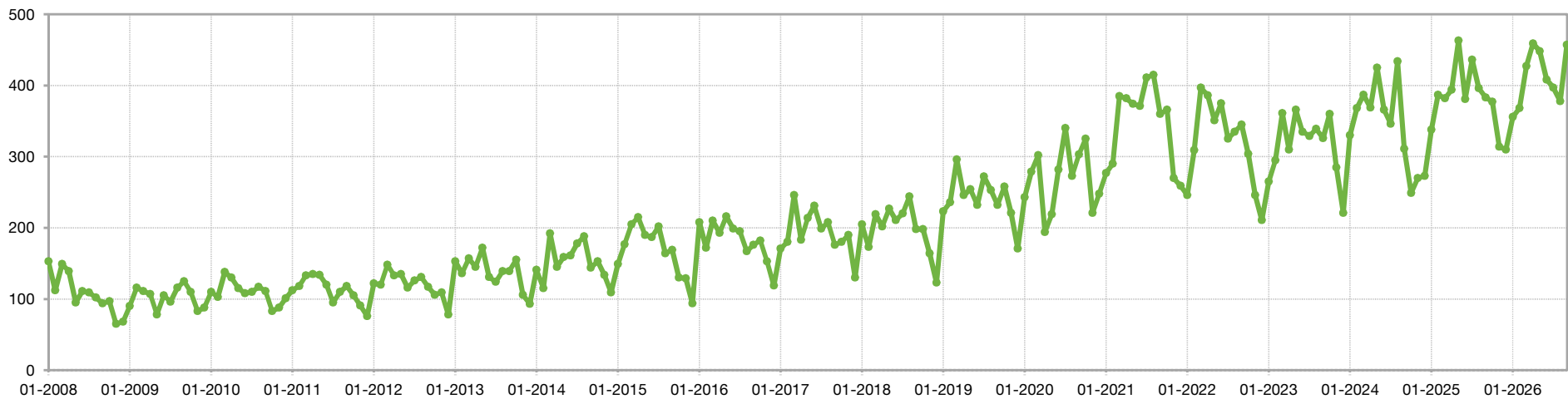


Year to Date



New Listings		Prior Year	Percent Change
October 2025	377	249	+51.4%
November 2025	314	270	+16.3%
December 2025	310	273	+13.6%
January 2026	356	338	+5.3%
February 2026	368	387	-4.9%
March 2026	427	382	+11.8%
April 2026	459	394	+16.5%
May 2026	448	463	-3.2%
June 2026	408	381	+7.1%
July 2026	397	436	-8.9%
August 2026	378	396	-4.5%
September 2026	457	383	+19.3%
12-Month Avg	392	363	+8.0%

Historical New Listings by Month

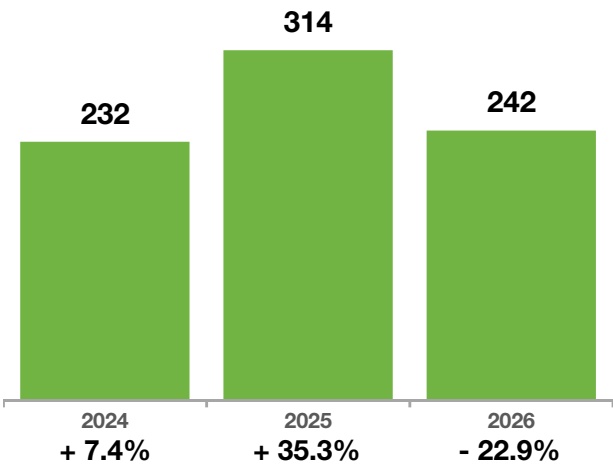


Pending Sales

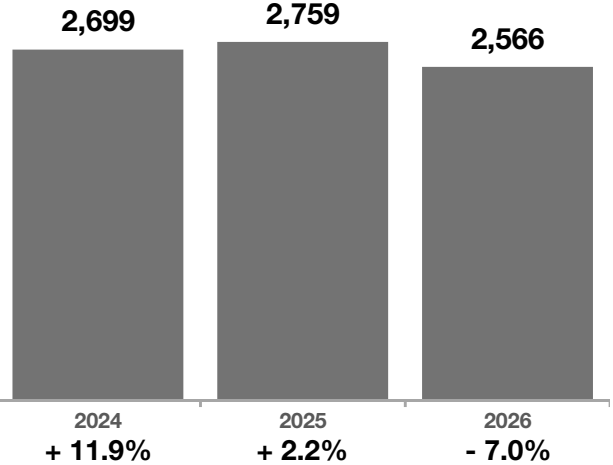
A count of the properties on which offers have been accepted in a given month.



September

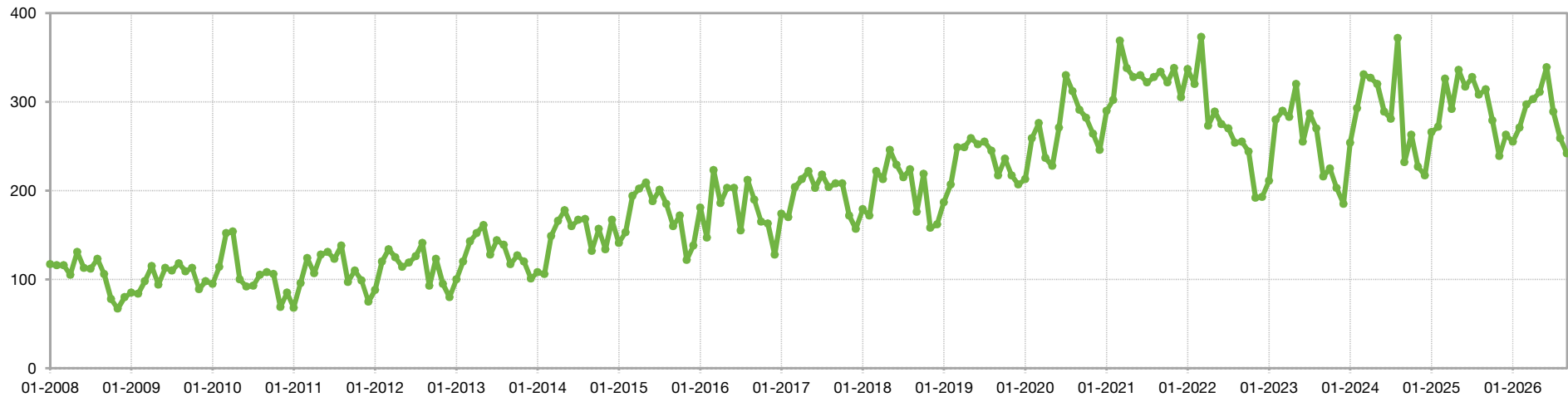


Year to Date



Pending Sales		Prior Year	Percent Change
October 2025	279	263	+6.1%
November 2025	239	227	+5.3%
December 2025	263	217	+21.2%
January 2026	255	266	-4.1%
February 2026	271	272	-0.4%
March 2026	297	326	-8.9%
April 2026	303	292	+3.8%
May 2026	311	336	-7.4%
June 2026	339	317	+6.9%
July 2026	289	328	-11.9%
August 2026	259	308	-15.9%
September 2026	242	314	-22.9%
12-Month Avg	279	289	-3.4%

Historical Pending Sales by Month

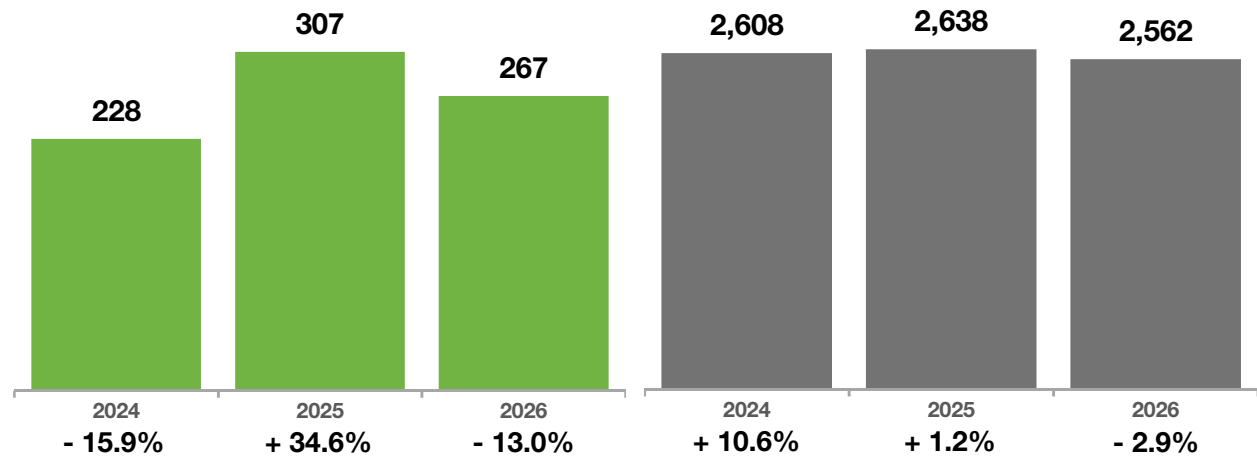


Closed Sales

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

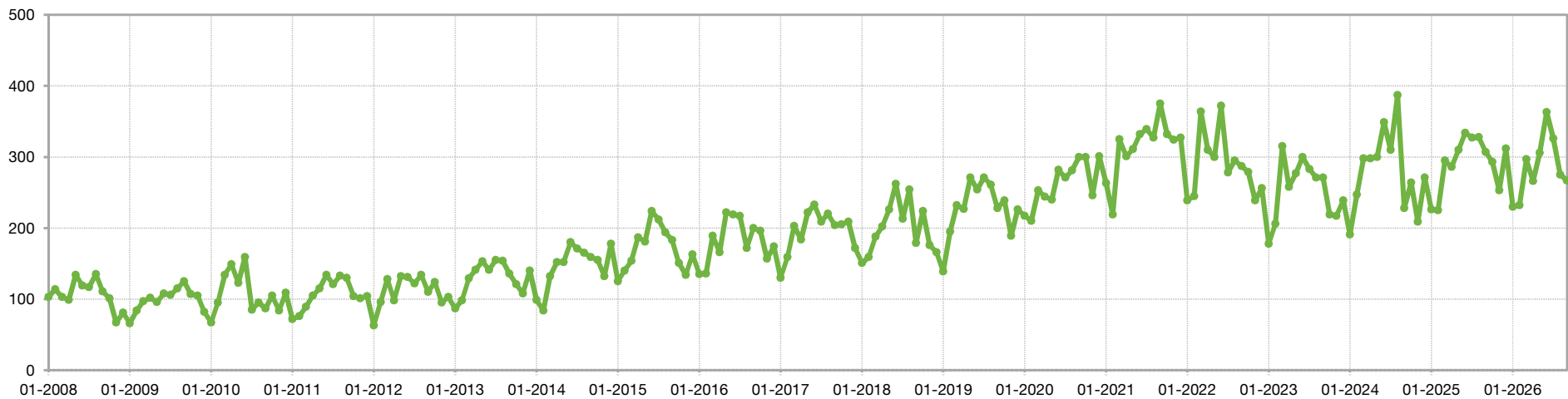


September



Closed Sales		Prior Year	Percent Change
October 2025	293	264	+11.0%
November 2025	253	209	+21.1%
December 2025	312	271	+15.1%
January 2026	230	226	+1.8%
February 2026	232	225	+3.1%
March 2026	297	295	+0.7%
April 2026	266	286	-7.0%
May 2026	306	310	-1.3%
June 2026	363	334	+8.7%
July 2026	326	327	-0.3%
August 2026	275	328	-16.2%
September 2026	267	307	-13.0%
12-Month Avg	285	282	+1.1%

Historical Closed Sales by Month

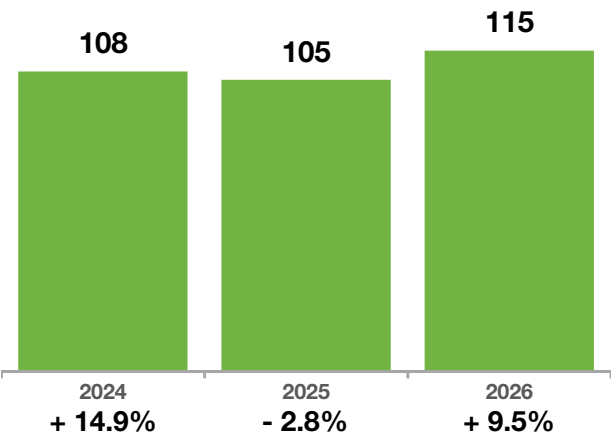


Days on Market Until Sale

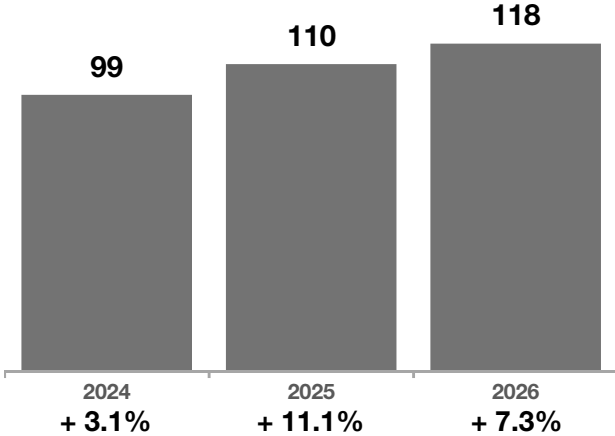
Average number of days between when a property is listed and when an offer is accepted in a given month.



September



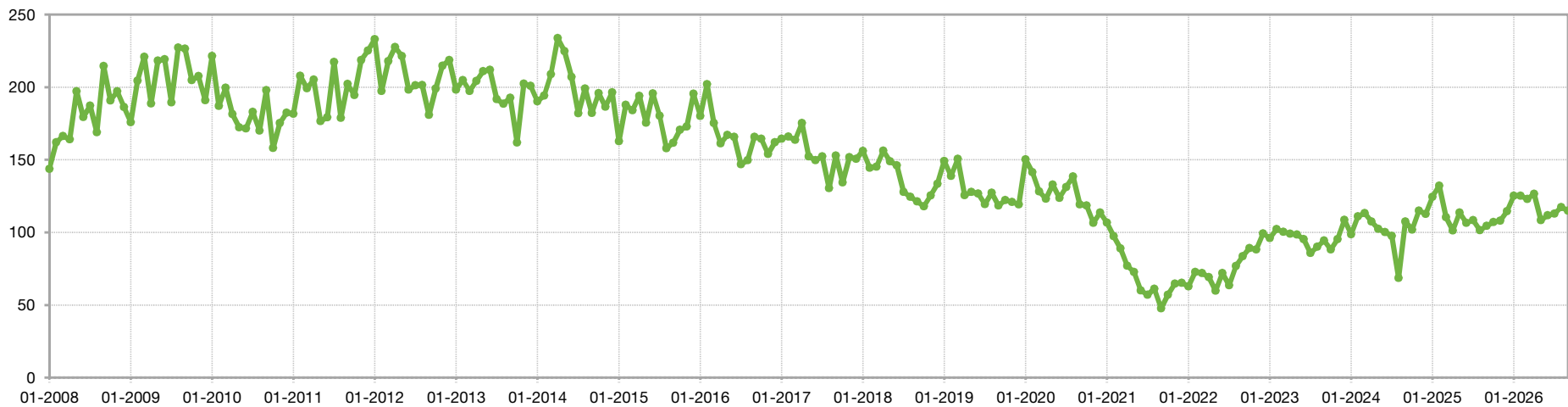
Year to Date



Days on Market		Prior Year	Percent Change
October 2025	107	102	+4.9%
November 2025	108	115	-6.1%
December 2025	115	113	+1.8%
January 2026	125	124	+0.8%
February 2026	125	132	-5.3%
March 2026	123	110	+11.8%
April 2026	127	101	+25.7%
May 2026	108	114	-5.3%
June 2026	112	107	+4.7%
July 2026	113	108	+4.6%
August 2026	117	101	+15.8%
September 2026	115	105	+9.5%
12-Month Avg*	116	110	+5.5%

* Average Days on Market of all properties from October 2025 through September 2026. This is not the average of the individual figures above.

Historical Days on Market Until Sale by Month



Median Sales Price

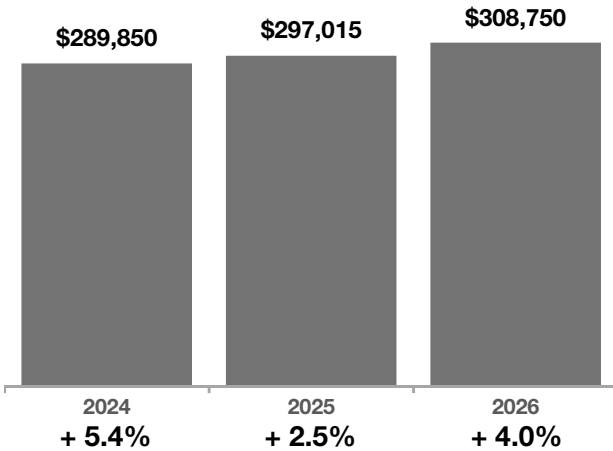
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



September



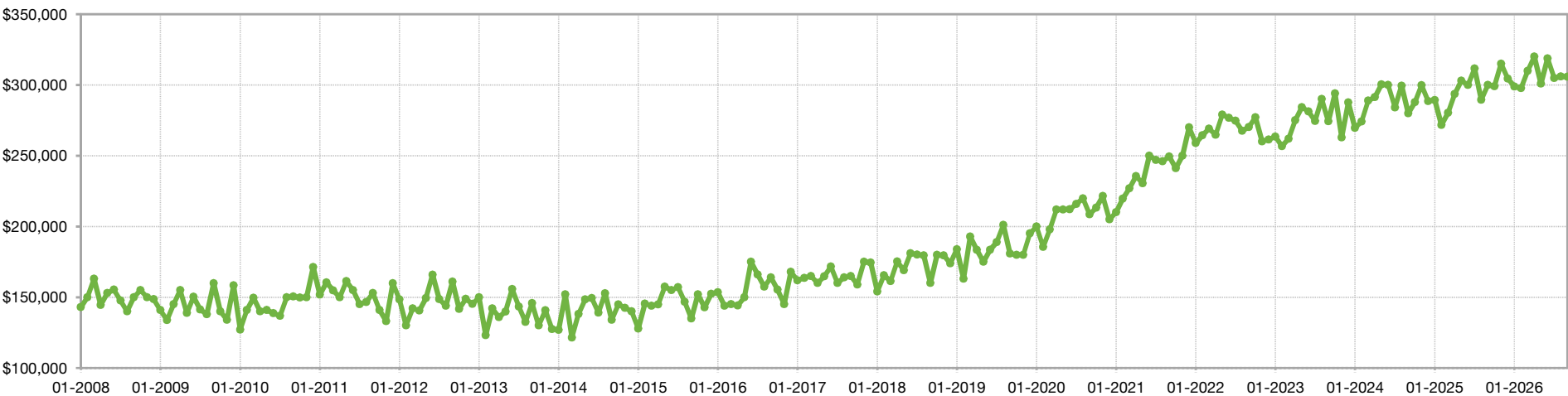
Year to Date



	Median Sales Price	Prior Year	Percent Change
October 2025	\$299,000	\$287,750	+3.9%
November 2025	\$314,900	\$299,900	+5.0%
December 2025	\$304,484	\$288,500	+5.5%
January 2026	\$298,950	\$289,400	+3.3%
February 2026	\$297,785	\$271,730	+9.6%
March 2026	\$309,900	\$280,350	+10.5%
April 2026	\$320,000	\$293,700	+9.0%
May 2026	\$301,000	\$303,000	-0.7%
June 2026	\$318,750	\$300,000	+6.3%
July 2026	\$304,950	\$311,650	-2.1%
August 2026	\$306,000	\$289,450	+5.7%
September 2026	\$305,850	\$300,000	+2.0%
12-Month Med*	\$306,950	\$295,000	+4.1%

* Median Sales Price of all properties from October 2025 through September 2026. This is not the median of the individual figures above.

Historical Median Sales Price by Month

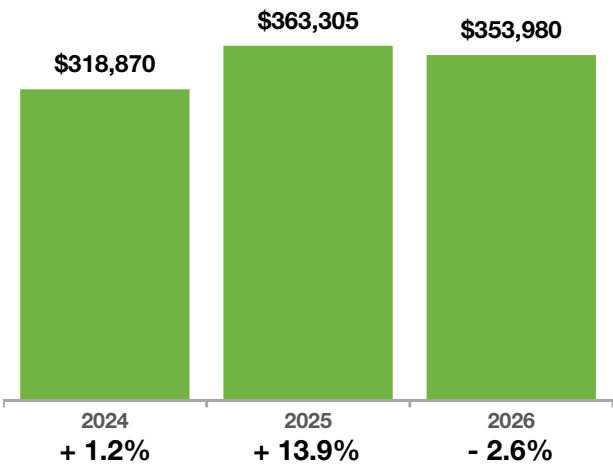


Average Sales Price

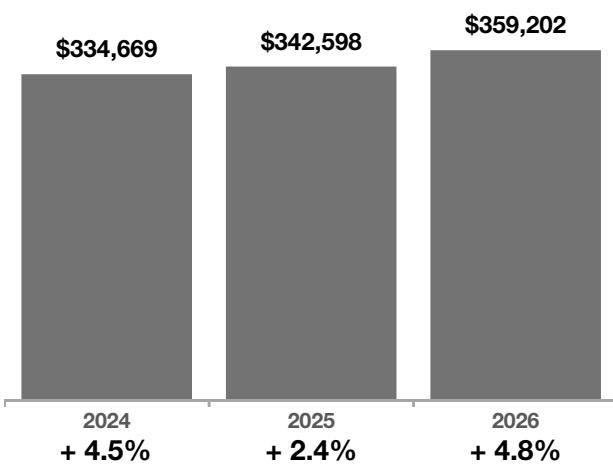
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



September



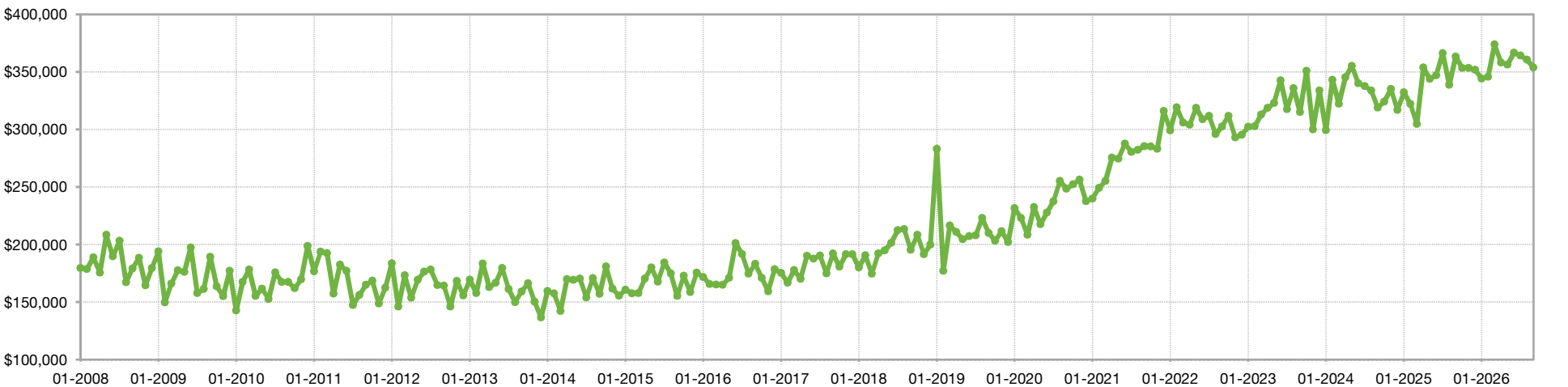
Year to Date



Avg. Sales Price	Prior Year	Percent Change
October 2025	\$353,401	\$324,156 +9.0%
November 2025	\$353,314	\$335,081 +5.4%
December 2025	\$351,830	\$317,000 +11.0%
January 2026	\$344,098	\$332,296 +3.6%
February 2026	\$345,769	\$322,110 +7.3%
March 2026	\$373,849	\$304,746 +22.7%
April 2026	\$358,189	\$353,958 +1.2%
May 2026	\$356,394	\$344,053 +3.6%
June 2026	\$366,739	\$347,186 +5.6%
July 2026	\$364,271	\$366,314 -0.6%
August 2026	\$360,563	\$338,741 +6.4%
September 2026	\$353,980	\$363,305 -2.6%
12-Month Avg*	\$356,867	\$337,412 +5.8%

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

Historical Average Sales Price by Month

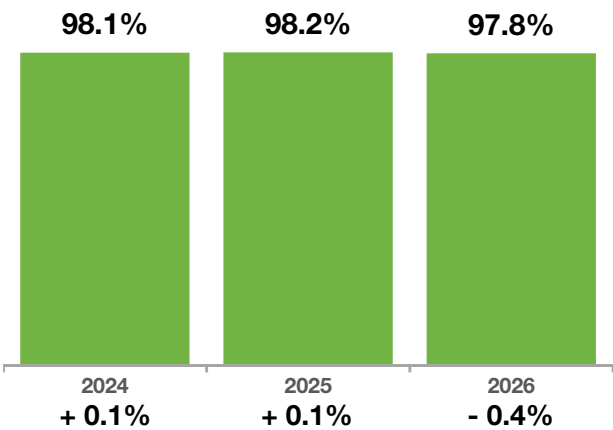


Percent of List Price Received

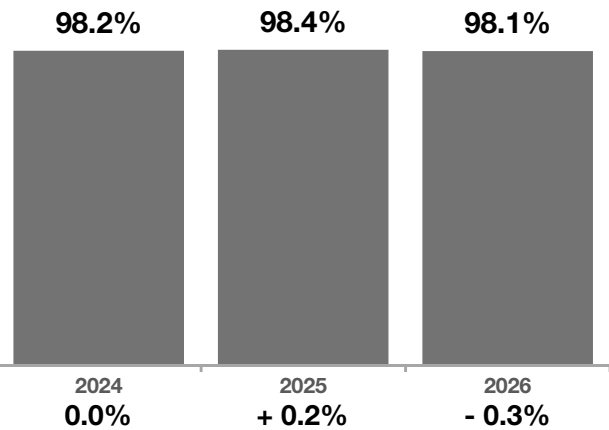
Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



September



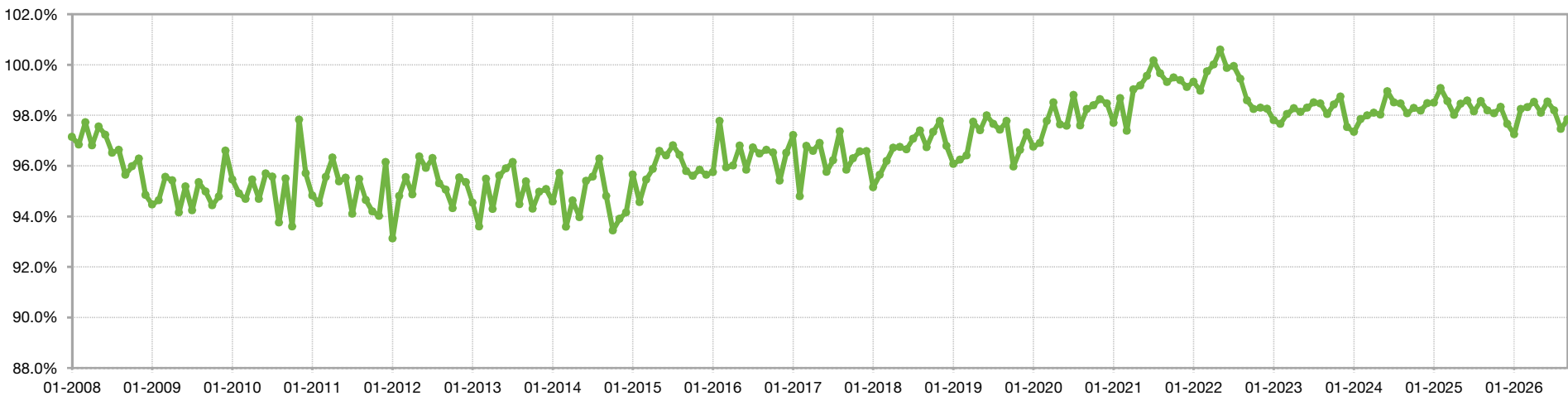
Year to Date



	Pct. of List Price Received	Prior Year	Percent Change
October 2025	98.1%	98.3%	-0.2%
November 2025	98.3%	98.2%	+0.1%
December 2025	97.7%	98.5%	-0.8%
January 2026	97.2%	98.5%	-1.3%
February 2026	98.2%	99.1%	-0.9%
March 2026	98.3%	98.6%	-0.3%
April 2026	98.5%	98.0%	+0.5%
May 2026	98.1%	98.5%	-0.4%
June 2026	98.5%	98.6%	-0.1%
July 2026	98.2%	98.1%	+0.1%
August 2026	97.5%	98.6%	-1.1%
September 2026	97.8%	98.2%	-0.4%
12-Month Avg*	98.1%	98.4%	-0.3%

* Average Pct. of List Price Received for all properties from October 2025 through September 2026. This is not the average of the individual figures above.

Historical Percent of List Price Received by Month

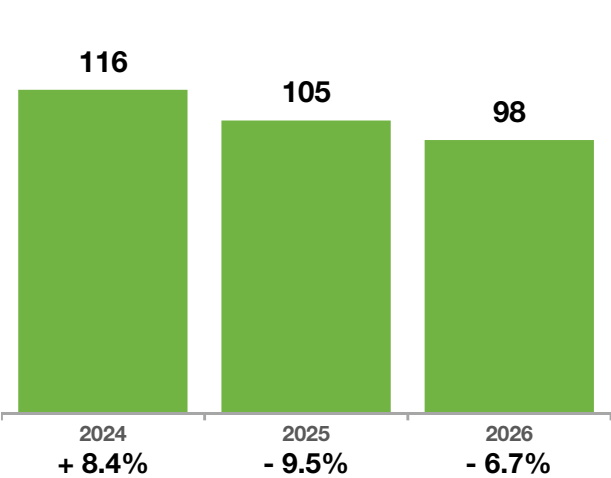


Housing Affordability Index

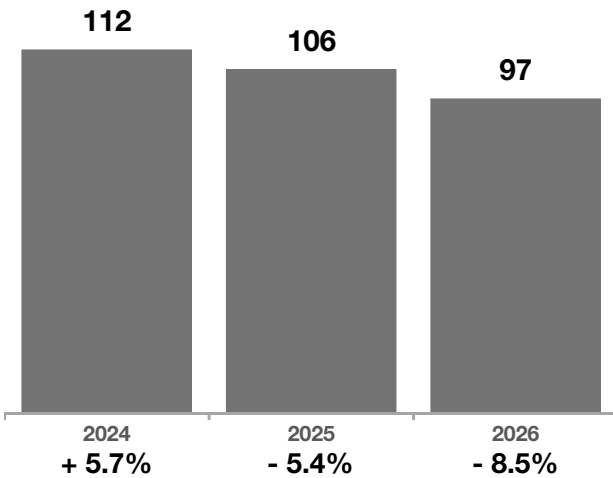
This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.



September

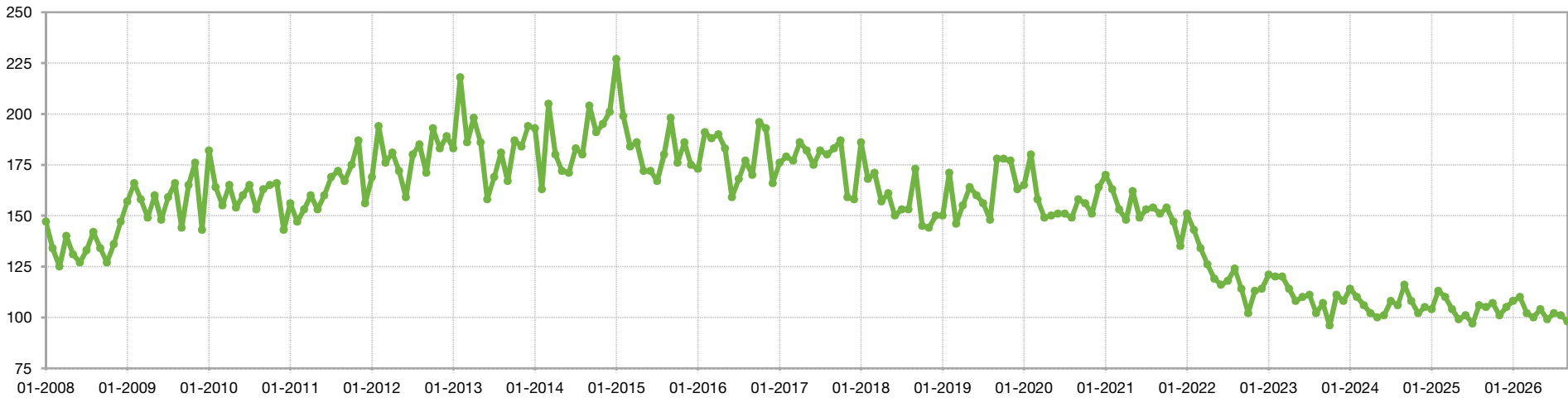


Year to Date



Affordability Index		Prior Year	Percent Change
October 2025	107	108	-0.9%
November 2025	101	102	-1.0%
December 2025	105	105	0.0%
January 2026	108	104	+3.8%
February 2026	110	113	-2.7%
March 2026	102	110	-7.3%
April 2026	100	104	-3.8%
May 2026	104	99	+5.1%
June 2026	99	101	-2.0%
July 2026	102	97	+5.2%
August 2026	101	106	-4.7%
September 2026	98	105	-6.7%
12-Month Avg	103	105	-1.4%

Historical Housing Affordability Index by Month

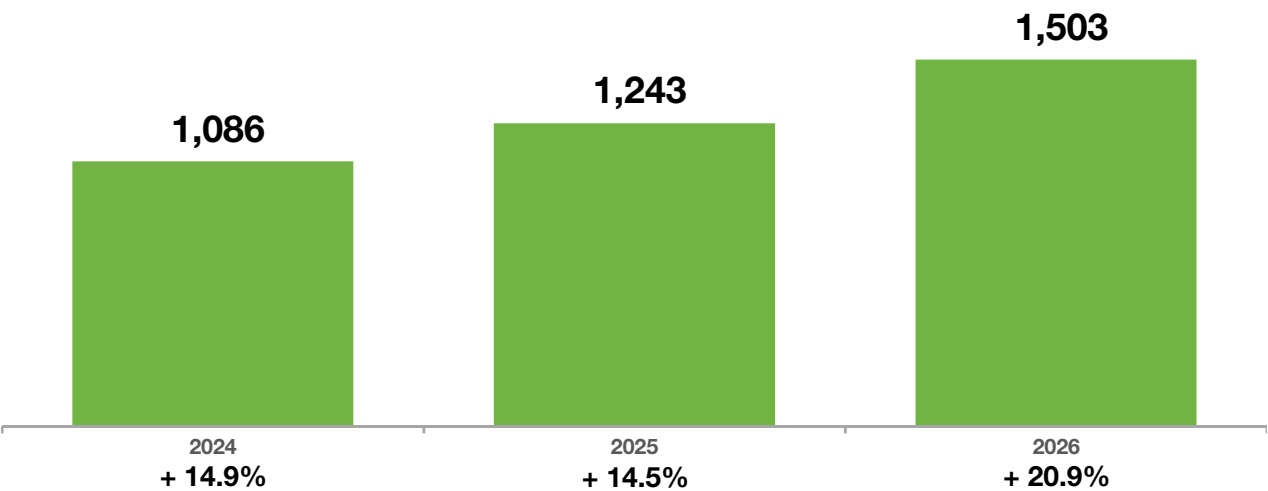


Inventory of Homes for Sale

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



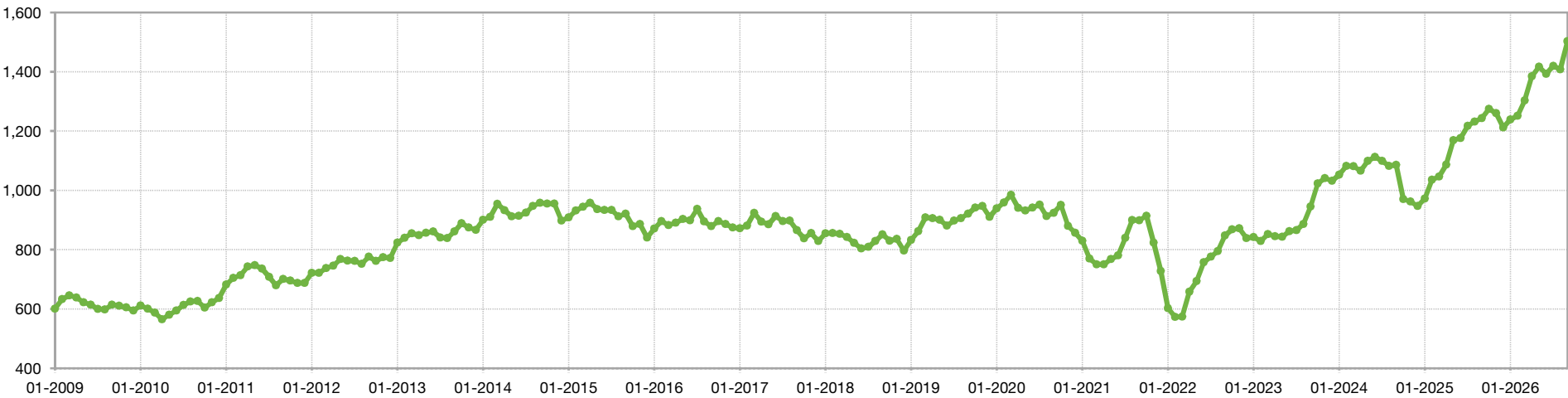
September



Homes for Sale		Prior Year	Percent Change
October 2025	1,275	970	+31.4%
November 2025	1,260	962	+31.0%
December 2025	1,212	947	+28.0%
January 2026	1,239	972	+27.5%
February 2026	1,251	1,036	+20.8%
March 2026	1,303	1,046	+24.6%
April 2026	1,385	1,087	+27.4%
May 2026	1,417	1,169	+21.2%
June 2026	1,393	1,176	+18.5%
July 2026	1,420	1,217	+16.7%
August 2026	1,408	1,232	+14.3%
September 2026	1,503	1,243	+20.9%
12-Month Avg*	1,339	1,088	+23.1%

* Homes for Sale for all properties from October 2025 through September 2026. This is not the average of the individual figures above.

Historical Inventory of Homes for Sale by Month

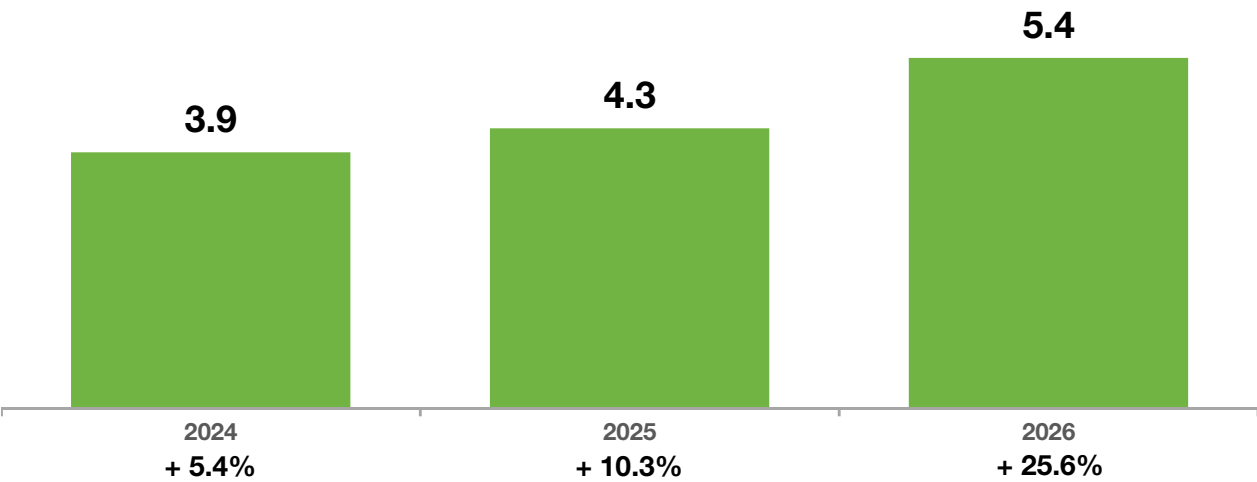


Months Supply of Inventory

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.



September



Months Supply		Prior Year	Percent Change
October 2025	4.4	3.5	+25.7%
November 2025	4.3	3.4	+26.5%
December 2025	4.1	3.3	+24.2%
January 2026	4.2	3.4	+23.5%
February 2026	4.3	3.7	+16.2%
March 2026	4.5	3.7	+21.6%
April 2026	4.7	3.9	+20.5%
May 2026	4.9	4.2	+16.7%
June 2026	4.8	4.1	+17.1%
July 2026	4.9	4.2	+16.7%
August 2026	4.9	4.4	+11.4%
September 2026	5.4	4.3	+25.6%
12-Month Avg*	4.6	3.8	+21.1%

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

Historical Months Supply of Inventory by Month

