

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 down 31.0 percent to 247. Pending Sales decreased 19.1 percent to 207. Inventory grew 1.0 percent to 1,359 units.

Median Sales Price was up 11.1 percent to \$465,000. Days on Market increased 9.7 percent to 136 days. Months Supply of Inventory was down 1.8 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

+ 4.6%	+ 11.1%	- 1.8%
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 Beaufort-Jasper County 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.



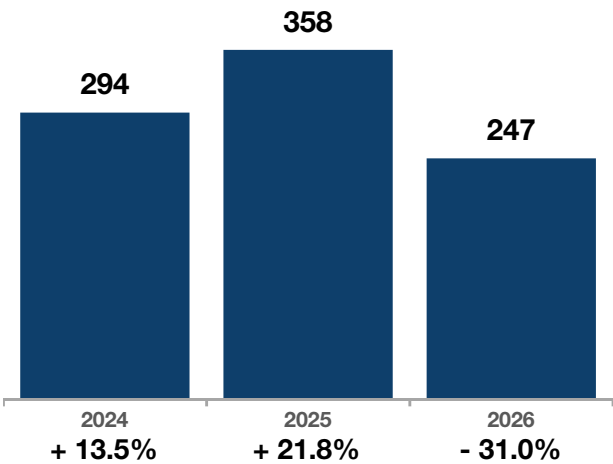
Key Metrics	Historical Sparkbars			09-2025	09-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
	09-2024	09-2025	09-2026						
New Listings				358	247	- 31.0%	3,439	3,271	- 4.9%
Pending Sales				256	207	- 19.1%	2,351	2,435	+ 3.6%
Closed Sales				240	251	+ 4.6%	2,223	2,216	- 0.3%
Days on Market				124	136	+ 9.7%	119	132	+ 10.9%
Median Sales Price				\$418,531	\$465,000	+ 11.1%	\$440,000	\$449,945	+ 2.3%
Average Sales Price				\$580,965	\$615,215	+ 5.9%	\$585,001	\$612,102	+ 4.6%
Pct. of List Price Received				97.6%	97.6%	0.0%	97.4%	97.2%	- 0.2%
Housing Affordability Index				80	70	- 12.5%	76	72	- 5.3%
Inventory of Homes for Sale				1,346	1,359	+ 1.0%	--	--	--
Months Supply of Inventory				5.5	5.4	- 1.8%	--	--	--

New Listings

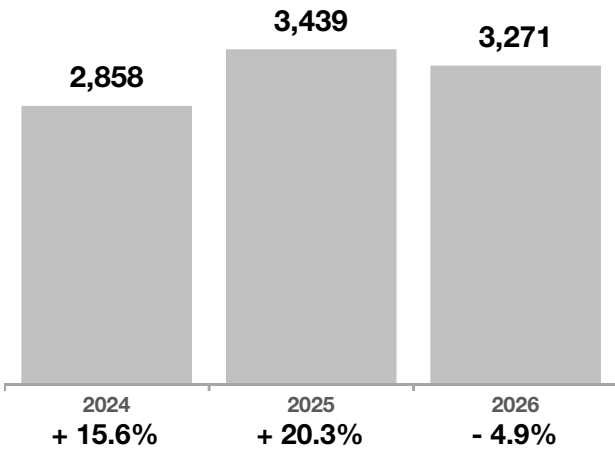
A count of the properties that have been newly listed on the market in a given month.



September

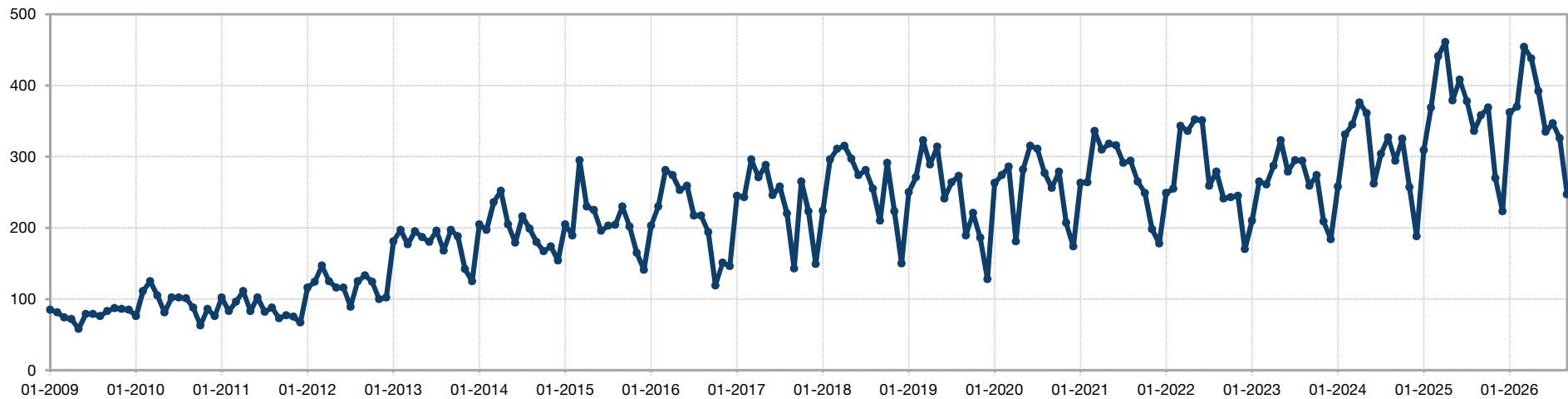


Year to Date



New Listings		Prior Year	Percent Change
October 2025	369	325	+13.5%
November 2025	270	257	+5.1%
December 2025	223	188	+18.6%
January 2026	362	309	+17.2%
February 2026	370	369	+0.3%
March 2026	454	441	+2.9%
April 2026	438	461	-5.0%
May 2026	392	379	+3.4%
June 2026	335	408	-17.9%
July 2026	347	378	-8.2%
August 2026	326	336	-3.0%
September 2026	247	358	-31.0%
12-Month Avg	344	351	-1.8%

Historical New Listings by Month

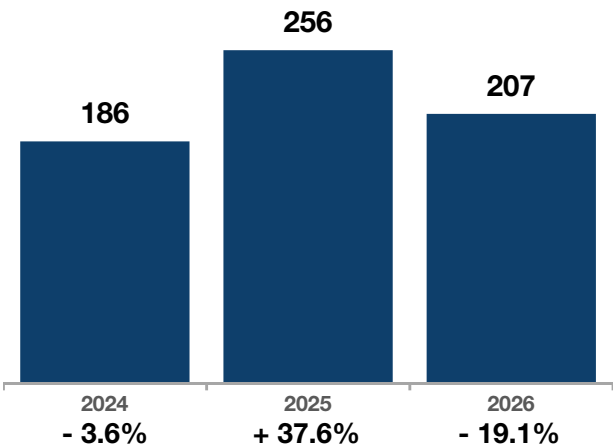


Pending Sales

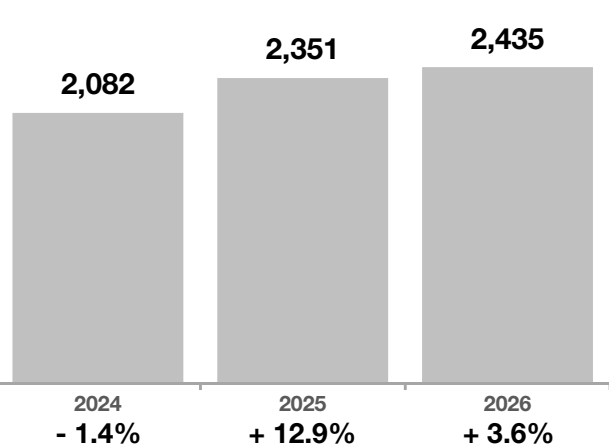
A count of the properties on which offers have been accepted in a given month.



September

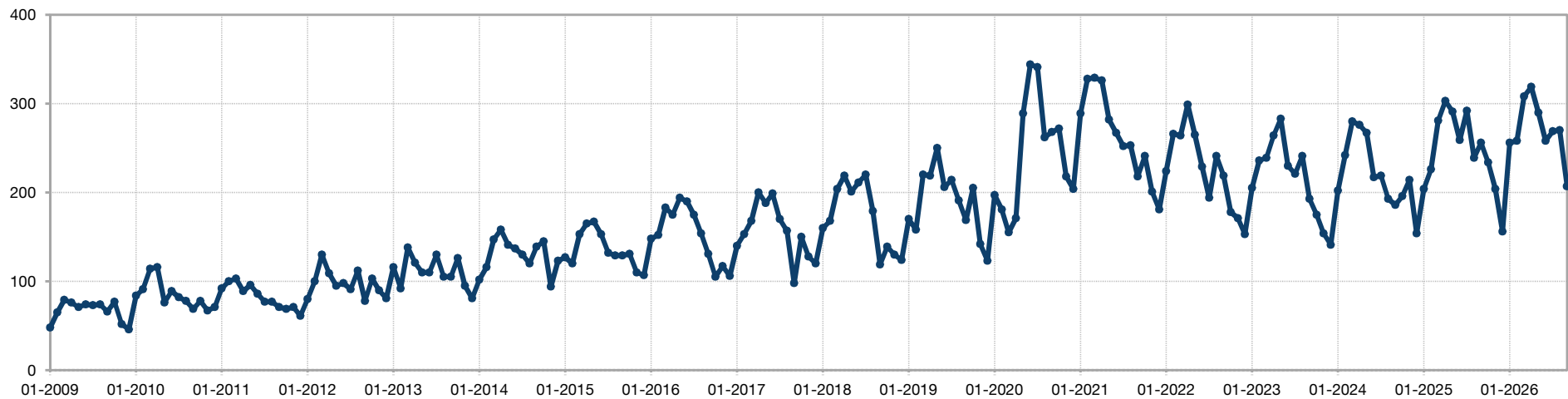


Year to Date



Pending Sales		Prior Year	Percent Change
October 2025	234	196	+19.4%
November 2025	204	214	-4.7%
December 2025	156	154	+1.3%
January 2026	256	204	+25.5%
February 2026	258	226	+14.2%
March 2026	308	281	+9.6%
April 2026	319	303	+5.3%
May 2026	290	291	-0.3%
June 2026	258	259	-0.4%
July 2026	269	292	-7.9%
August 2026	270	239	+13.0%
September 2026	207	256	-19.1%
12-Month Avg	252	243	+3.9%

Historical Pending Sales by Month

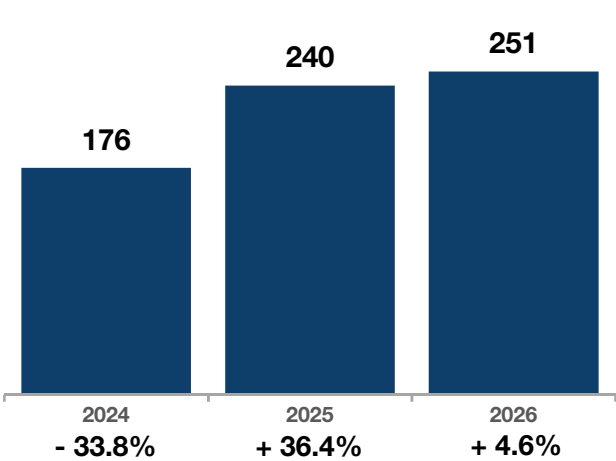


Closed Sales

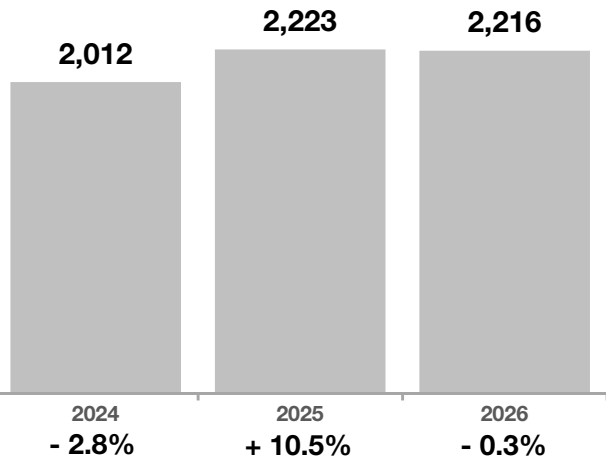
A count of the actual sales that closed in a given month.



September

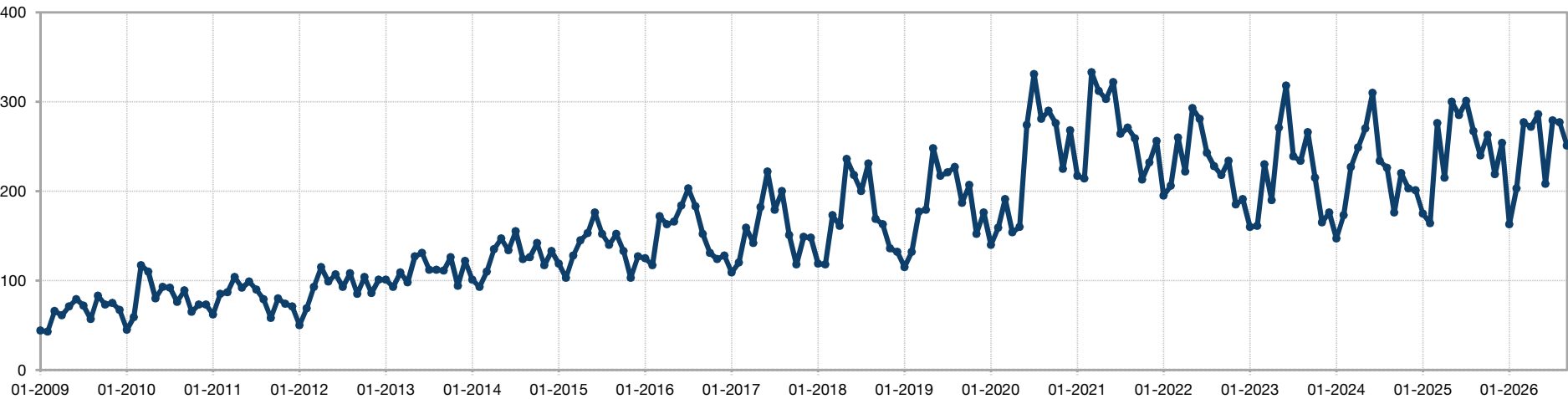


Year to Date



Closed Sales		Prior Year	Percent Change
October 2025	263	220	+19.5%
November 2025	219	203	+7.9%
December 2025	254	201	+26.4%
January 2026	163	175	-6.9%
February 2026	203	164	+23.8%
March 2026	277	276	+0.4%
April 2026	272	215	+26.5%
May 2026	286	300	-4.7%
June 2026	208	285	-27.0%
July 2026	279	301	-7.3%
August 2026	277	267	+3.7%
September 2026	251	240	+4.6%
12-Month Avg	246	237	+3.7%

Historical Closed Sales by Month

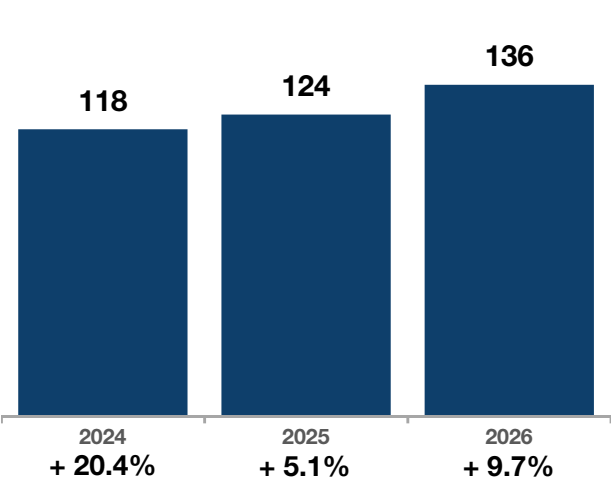


Days on Market Until Sale

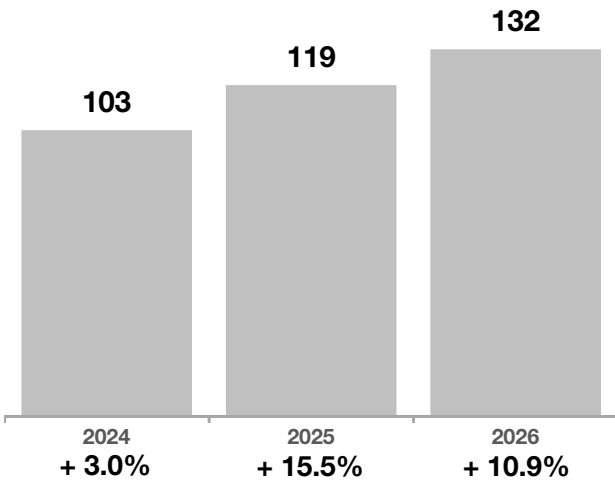
Average number of days between when a property is listed and when an offer is accepted in a given month.



September



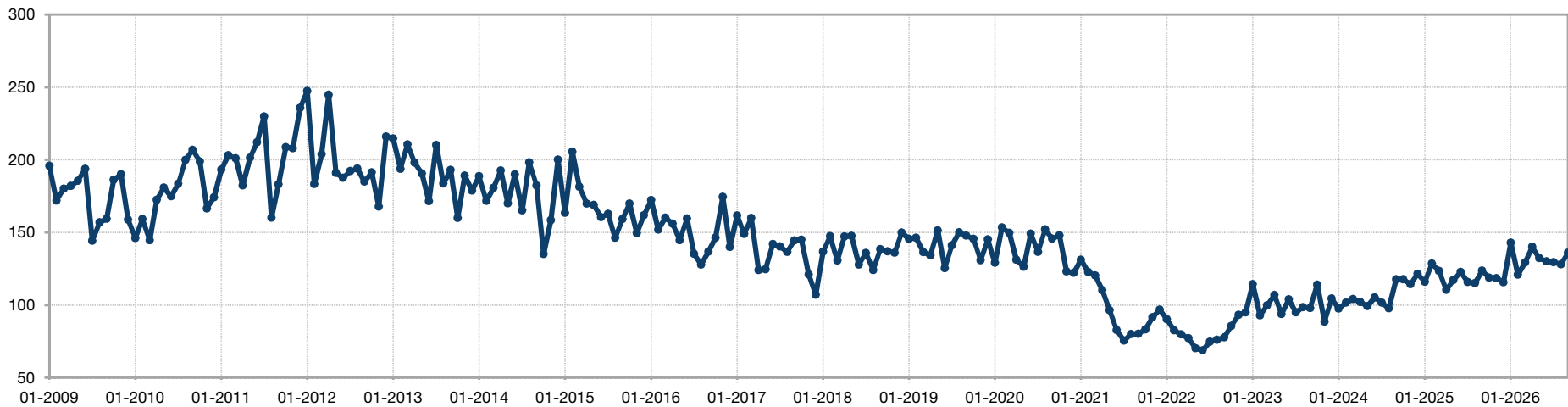
Year to Date



Days on Market		Prior Year	Percent Change
October 2025	119	118	+0.8%
November 2025	118	114	+3.5%
December 2025	116	121	-4.1%
January 2026	143	116	+23.3%
February 2026	121	129	-6.2%
March 2026	129	123	+4.9%
April 2026	140	110	+27.3%
May 2026	132	117	+12.8%
June 2026	130	123	+5.7%
July 2026	129	116	+11.2%
August 2026	128	115	+11.3%
September 2026	136	124	+9.7%
12-Month Avg*	128	119	+7.6%

* 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

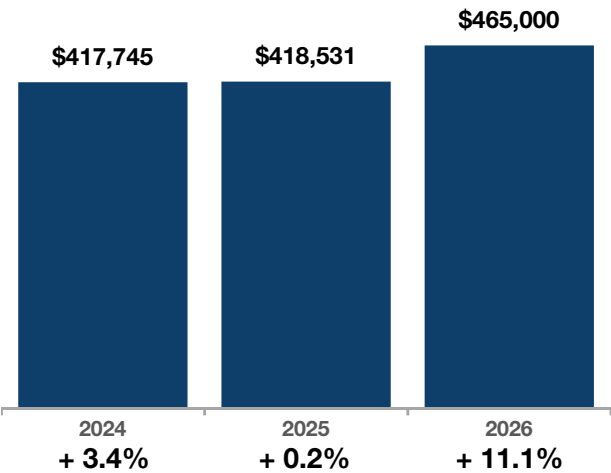


Median Sales Price

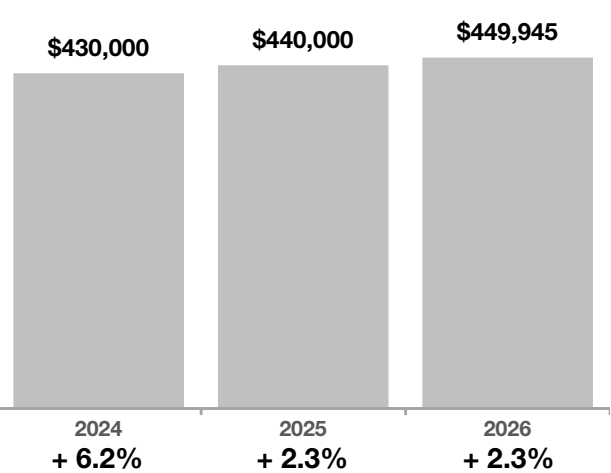
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



September



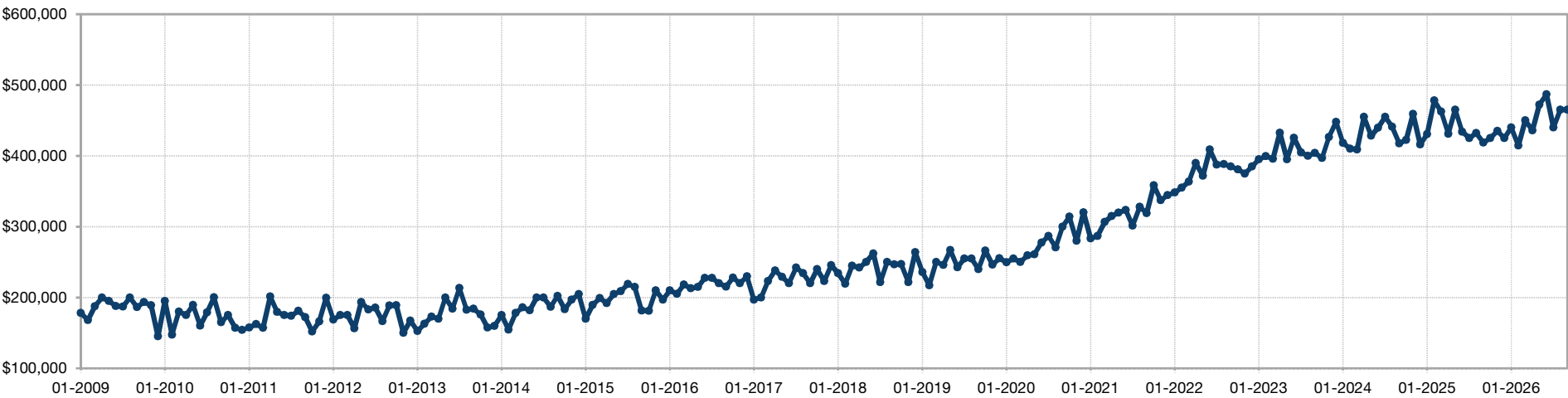
Year to Date



	Median Sales Price	Prior Year	Percent Change
October 2025	\$425,000	\$422,500	+0.6%
November 2025	\$435,000	\$459,000	-5.2%
December 2025	\$425,000	\$416,000	+2.2%
January 2026	\$440,107	\$430,490	+2.2%
February 2026	\$414,490	\$478,420	-13.4%
March 2026	\$450,000	\$462,603	-2.7%
April 2026	\$435,750	\$431,000	+1.1%
May 2026	\$472,095	\$465,000	+1.5%
June 2026	\$487,000	\$434,000	+12.2%
July 2026	\$440,000	\$425,090	+3.5%
August 2026	\$465,000	\$432,000	+7.6%
September 2026	\$465,000	\$418,531	+11.1%
12-Month Med*	\$440,107	\$436,000	+0.9%

* 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

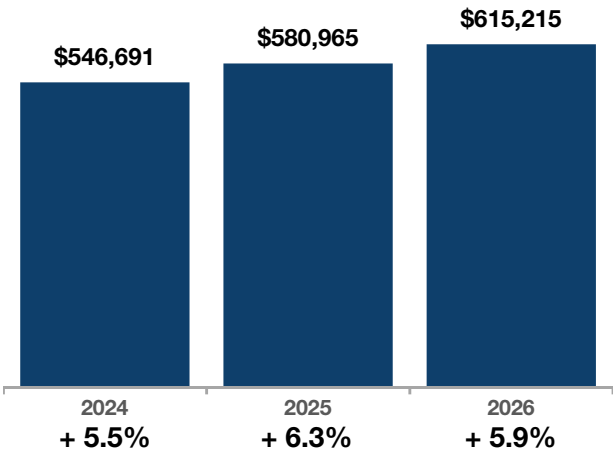


Average Sales Price

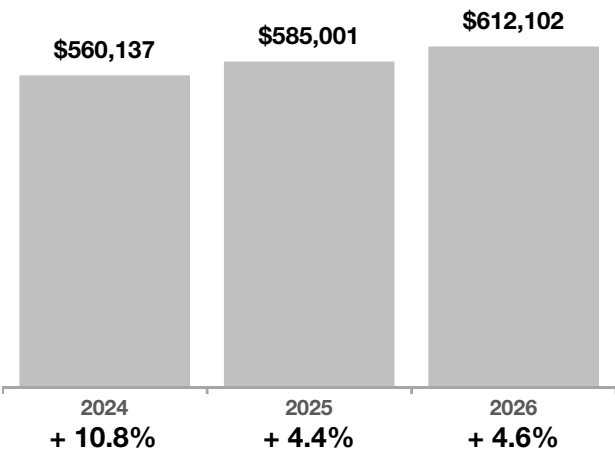
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



September



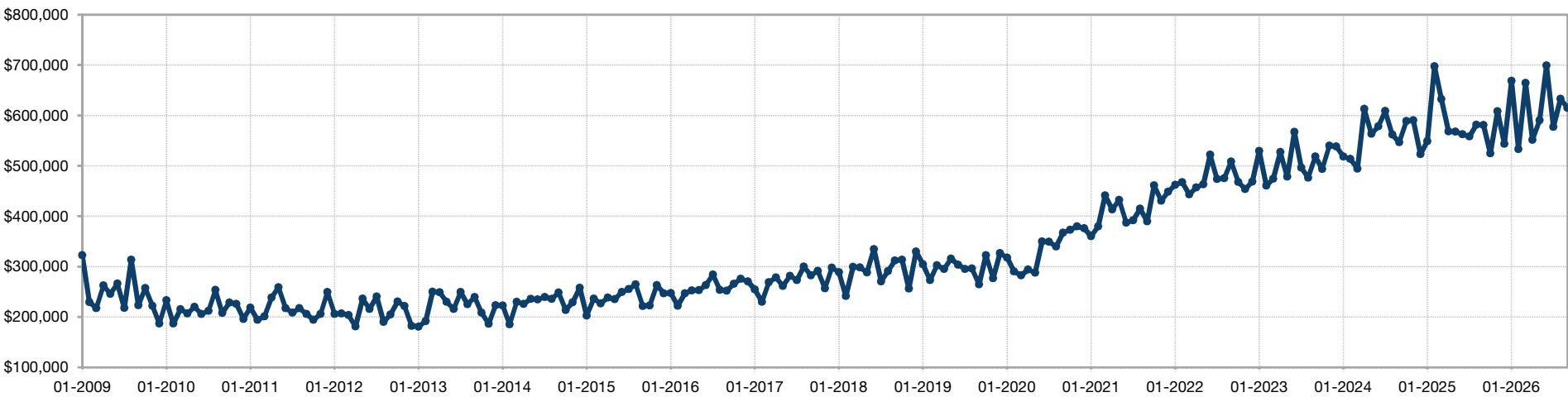
Year to Date



Avg. Sales Price		Prior Year	Percent Change
October 2025	\$524,540	\$588,843	-10.9%
November 2025	\$608,417	\$590,694	+3.0%
December 2025	\$543,858	\$523,087	+4.0%
January 2026	\$668,645	\$548,884	+21.8%
February 2026	\$533,215	\$697,538	-23.6%
March 2026	\$664,737	\$632,355	+5.1%
April 2026	\$551,331	\$568,529	-3.0%
May 2026	\$590,484	\$567,738	+4.0%
June 2026	\$699,239	\$562,607	+24.3%
July 2026	\$577,180	\$558,541	+3.3%
August 2026	\$632,924	\$581,467	+8.8%
September 2026	\$615,215	\$580,965	+5.9%
12-Month Avg*	\$600,816	\$583,437	+3.0%

* 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

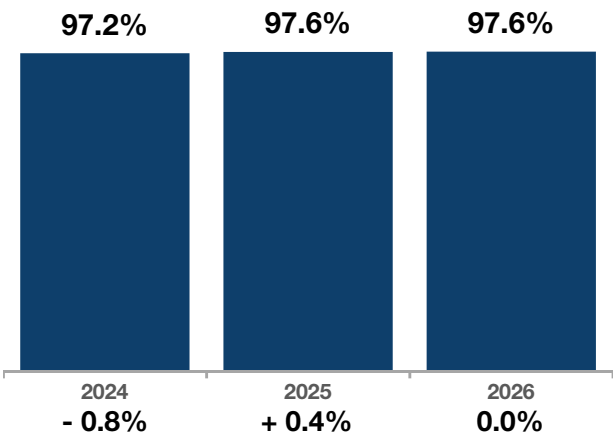


Percent of List Price Received

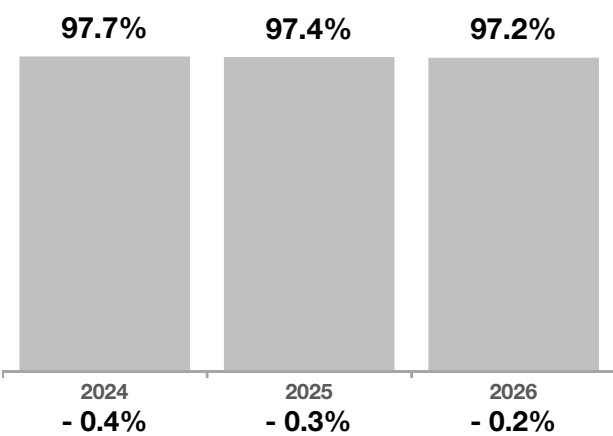
Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



September



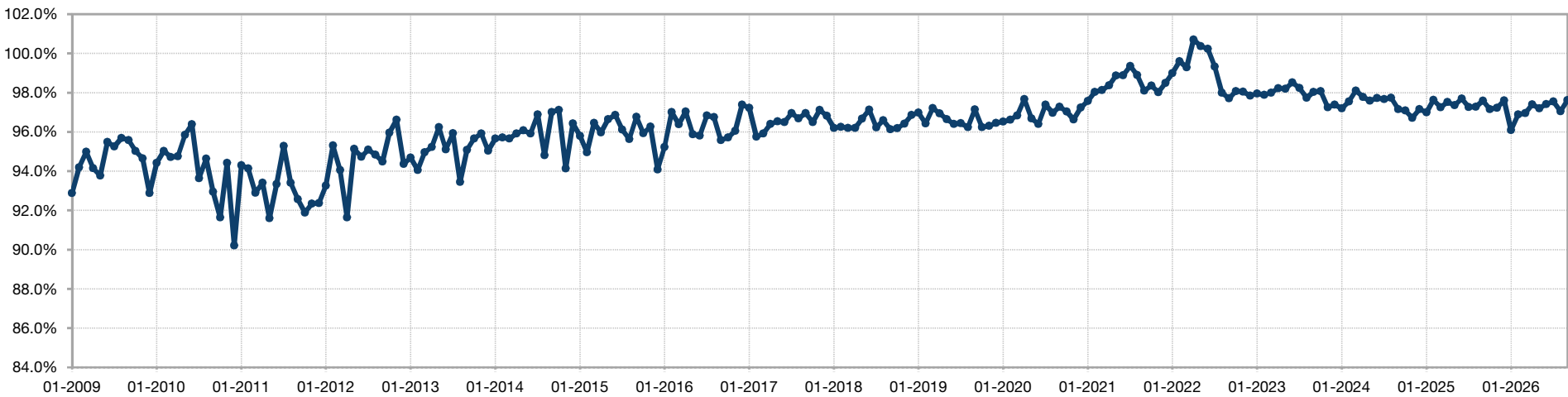
Year to Date



Pct. of List Price Received		Prior Year	Percent Change
October 2025	97.2%	97.1%	+0.1%
November 2025	97.2%	96.7%	+0.5%
December 2025	97.6%	97.2%	+0.4%
January 2026	96.1%	97.0%	-0.9%
February 2026	96.9%	97.6%	-0.7%
March 2026	97.0%	97.2%	-0.2%
April 2026	97.4%	97.5%	-0.1%
May 2026	97.2%	97.4%	-0.2%
June 2026	97.4%	97.7%	-0.3%
July 2026	97.5%	97.3%	+0.2%
August 2026	97.1%	97.3%	-0.2%
September 2026	97.6%	97.6%	0.0%
12-Month Avg*	97.2%	97.3%	-0.1%

* 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

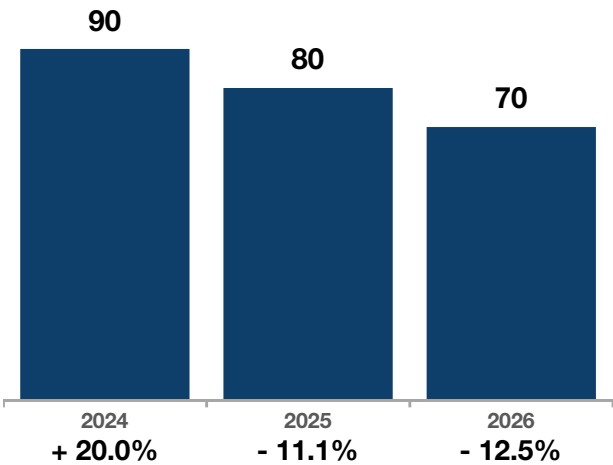


Housing Affordability Index

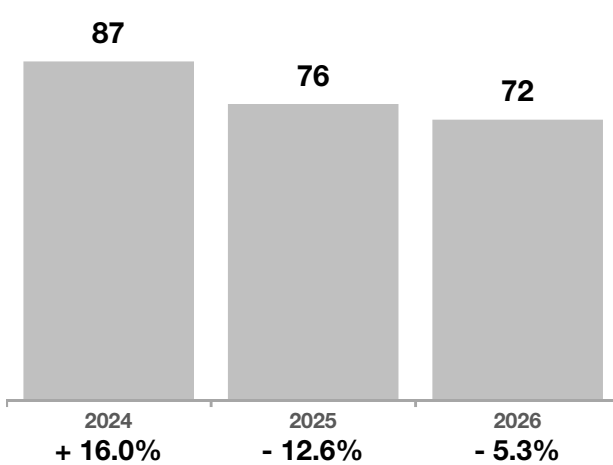
This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.



September

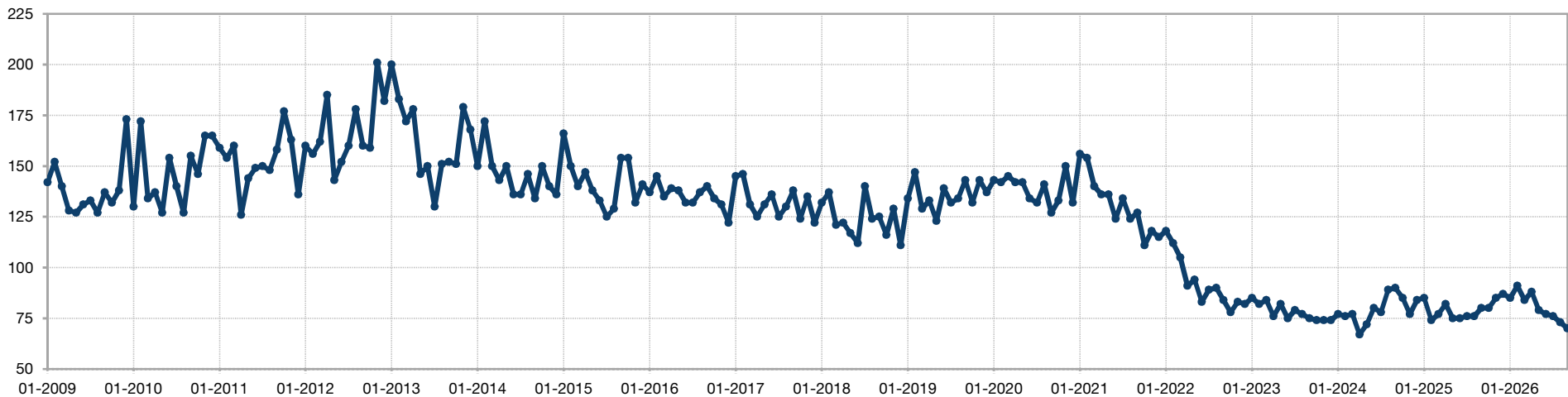


Year to Date



Affordability Index		Prior Year	Percent Change
October 2025	80	85	-5.9%
November 2025	85	77	+10.4%
December 2025	87	84	+3.6%
January 2026	85	85	0.0%
February 2026	91	74	+23.0%
March 2026	84	77	+9.1%
April 2026	88	82	+7.3%
May 2026	79	75	+5.3%
June 2026	77	75	+2.7%
July 2026	76	76	0.0%
August 2026	73	76	-3.9%
September 2026	70	80	-12.5%
12-Month Avg		81	+3.1%

Historical Housing Affordability Index by Month

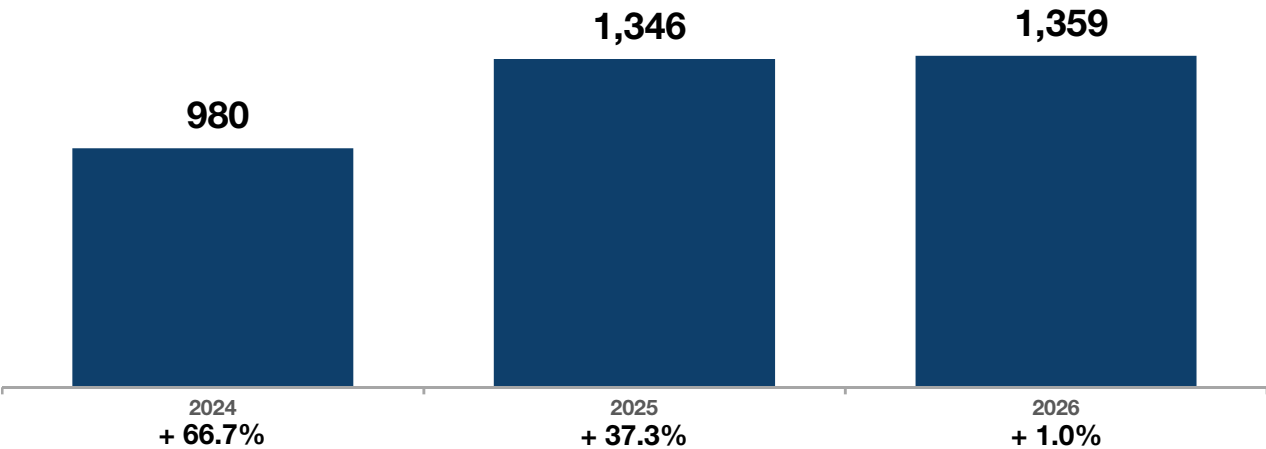


Inventory of Homes for Sale

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	1,374	1,043	+31.7%
November 2025	1,351	1,024	+31.9%
December 2025	1,293	968	+33.6%
January 2026	1,318	1,021	+29.1%
February 2026	1,371	1,112	+23.3%
March 2026	1,417	1,222	+16.0%
April 2026	1,461	1,306	+11.9%
May 2026	1,477	1,307	+13.0%
June 2026	1,490	1,372	+8.6%
July 2026	1,462	1,362	+7.3%
August 2026	1,424	1,357	+4.9%
September 2026	1,359	1,346	+1.0%
12-Month Avg*	1,400	1,203	+16.4%

* 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

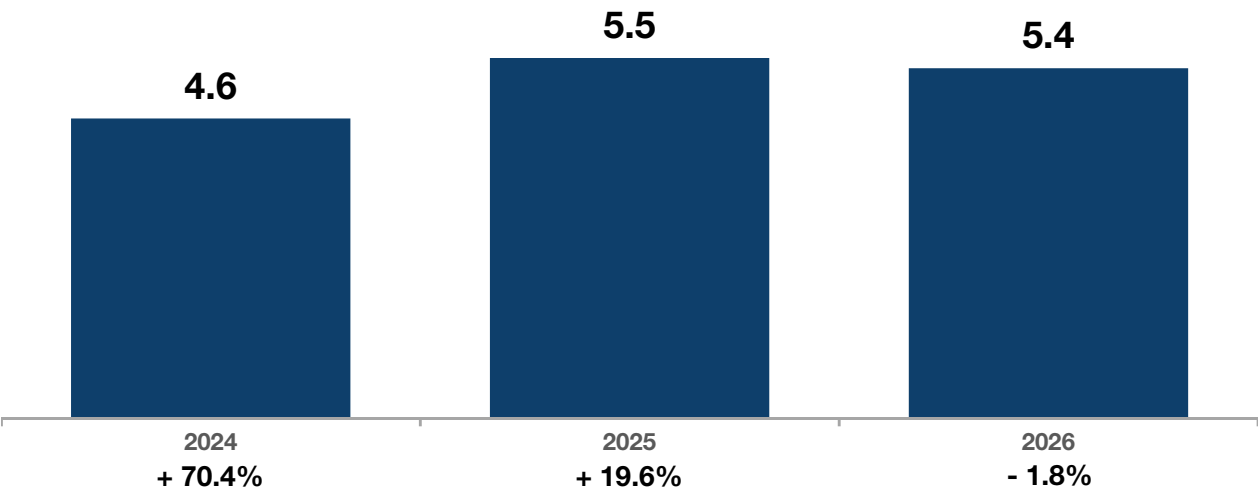


Months Supply of Inventory

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	5.6	4.9	+14.3%
November 2025	5.5	4.7	+17.0%
December 2025	5.3	4.4	+20.5%
January 2026	5.3	4.6	+15.2%
February 2026	5.4	5.1	+5.9%
March 2026	5.6	5.6	0.0%
April 2026	5.7	5.9	-3.4%
May 2026	5.8	5.8	0.0%
June 2026	5.8	6.0	-3.3%
July 2026	5.8	5.8	0.0%
August 2026	5.6	5.7	-1.8%
September 2026	5.4	5.5	-1.8%
12-Month Avg*	5.6	5.3	+5.7%

* 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

