

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 14.0 percent to 92. Pending Sales increased 18.8 percent to 82. Inventory grew 4.2 percent to 425 units.

Median Sales Price was up 6.4 percent to \$256,753. Days on Market decreased 3.6 percent to 81 days. Months Supply of Inventory was down 4.7 percent to 6.1 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

+ 24.2%	+ 6.4%	- 4.7%
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 Charleston Trident Association of REALTORS® covering Bamberg, Carnwell, Calhoun, Clarendon, Lexington, and Orangeburg counties. 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.



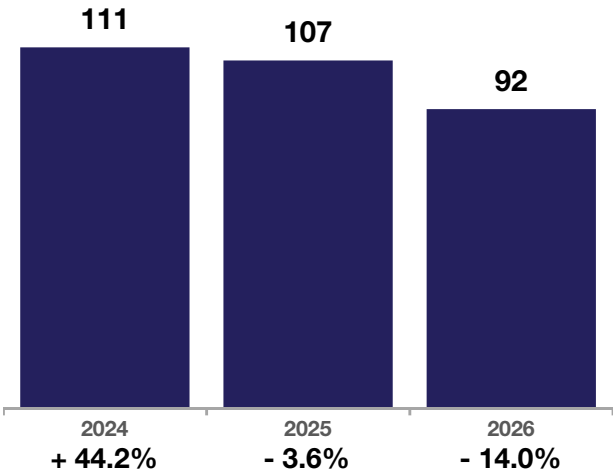
Key Metrics	Historical Sparkbars			09-2025	09-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
	09-2024	09-2025	09-2026						
New Listings				107	92	- 14.0%	988	1,037	+ 5.0%
Pending Sales				69	82	+ 18.8%	625	687	+ 9.9%
Closed Sales				66	82	+ 24.2%	595	625	+ 5.0%
Days on Market				84	81	- 3.6%	83	88	+ 6.0%
Median Sales Price				\$241,250	\$256,753	+ 6.4%	\$247,990	\$245,900	- 0.8%
Average Sales Price				\$288,265	\$269,120	- 6.6%	\$273,484	\$268,650	- 1.8%
Pct. of List Price Received				99.0%	95.9%	- 3.1%	97.1%	96.1%	- 1.0%
Housing Affordability Index				128	114	- 10.9%	124	119	- 4.0%
Inventory of Homes for Sale				408	425	+ 4.2%	--	--	--
Months Supply of Inventory				6.4	6.1	- 4.7%	--	--	--

New Listings

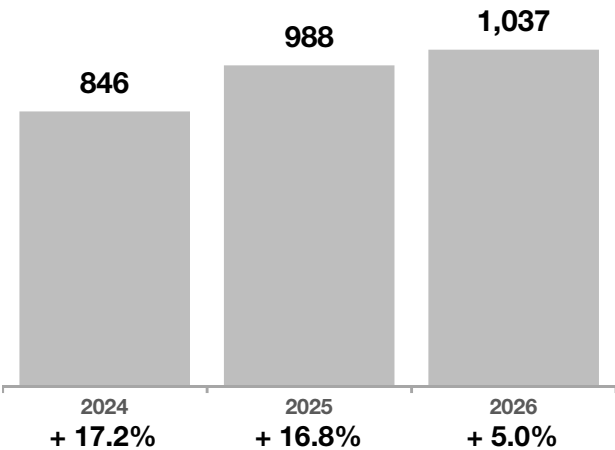
A count of the properties that have been newly listed on the market in a given month.



September

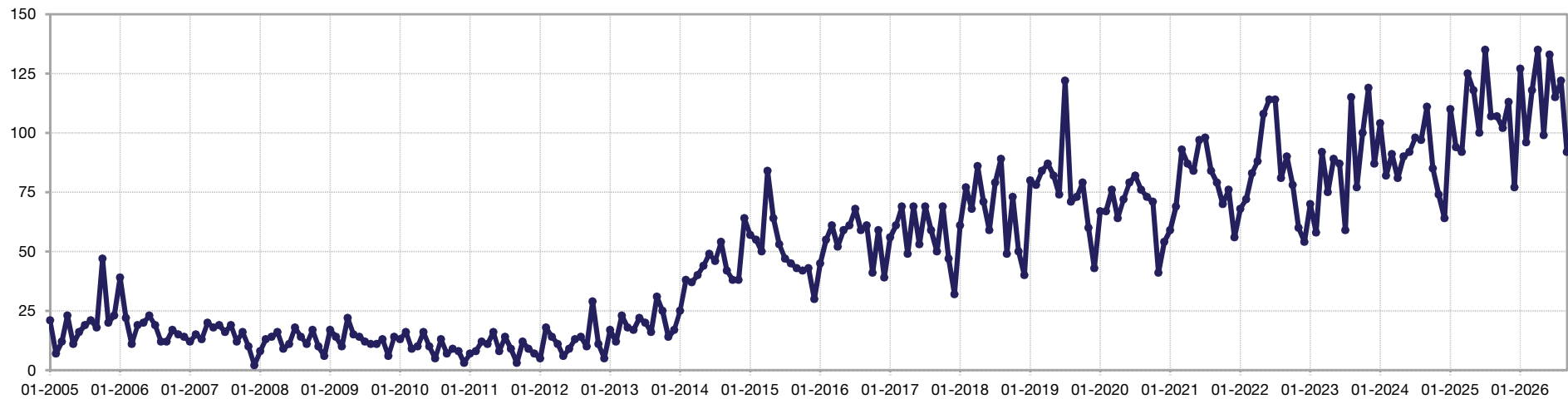


Year to Date



New Listings		Prior Year	Percent Change
October 2025	102	85	+20.0%
November 2025	113	74	+52.7%
December 2025	77	64	+20.3%
January 2026	127	110	+15.5%
February 2026	96	94	+2.1%
March 2026	118	92	+28.3%
April 2026	135	125	+8.0%
May 2026	99	118	-16.1%
June 2026	133	100	+33.0%
July 2026	115	135	-14.8%
August 2026	122	107	+14.0%
September 2026	92	107	-14.0%
12-Month Avg	111	101	+9.7%

Historical New Listings by Month

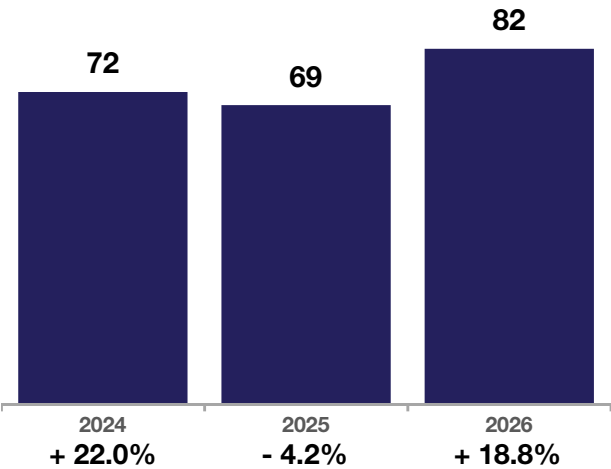


Pending Sales

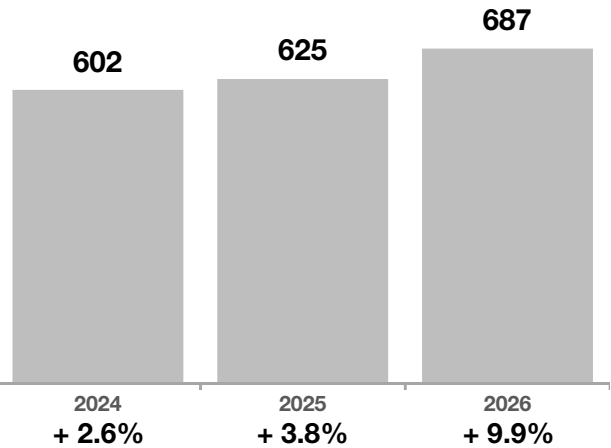
A count of the properties on which offers have been accepted in a given month.



September

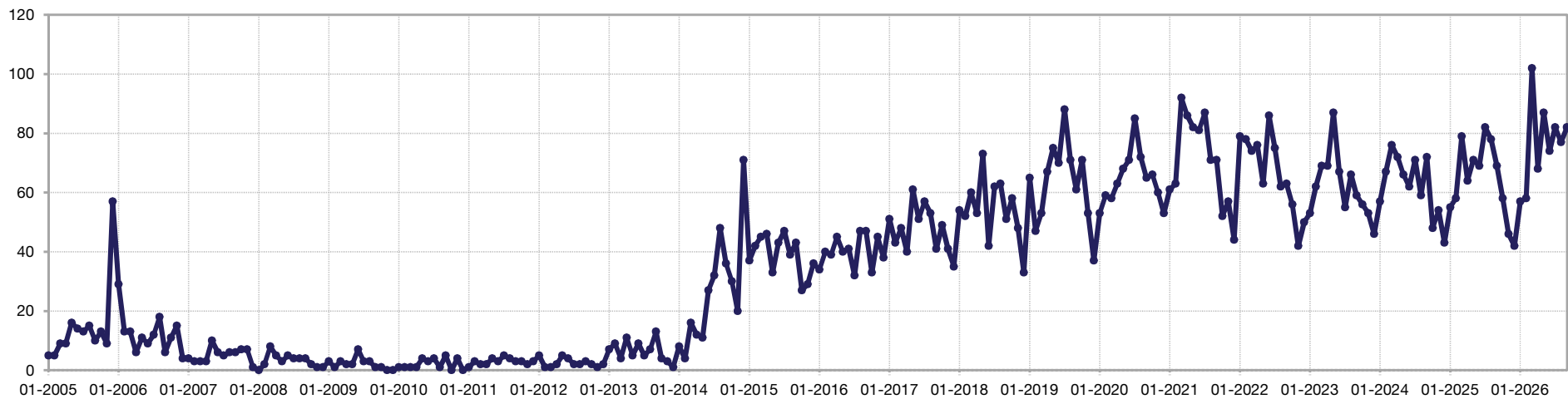


Year to Date



Pending Sales		Prior Year	Percent Change
October 2025	58	48	+20.8%
November 2025	46	54	-14.8%
December 2025	42	43	-2.3%
January 2026	57	55	+3.6%
February 2026	58	58	0.0%
March 2026	102	79	+29.1%
April 2026	68	64	+6.3%
May 2026	87	71	+22.5%
June 2026	74	69	+7.2%
July 2026	82	82	0.0%
August 2026	77	78	-1.3%
September 2026	82	69	+18.8%
12-Month Avg	69	64	+8.2%

Historical Pending Sales by Month

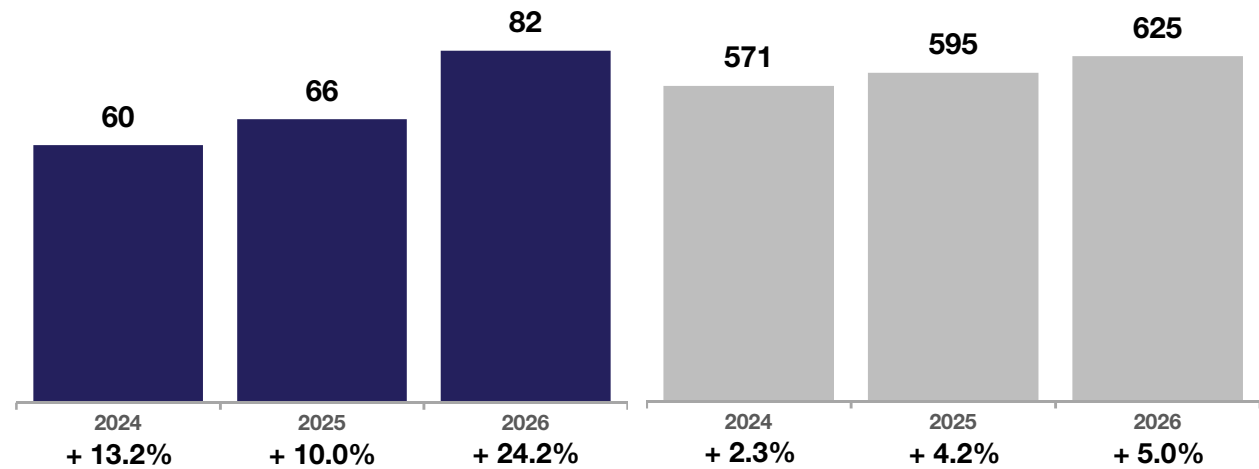


Closed Sales

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

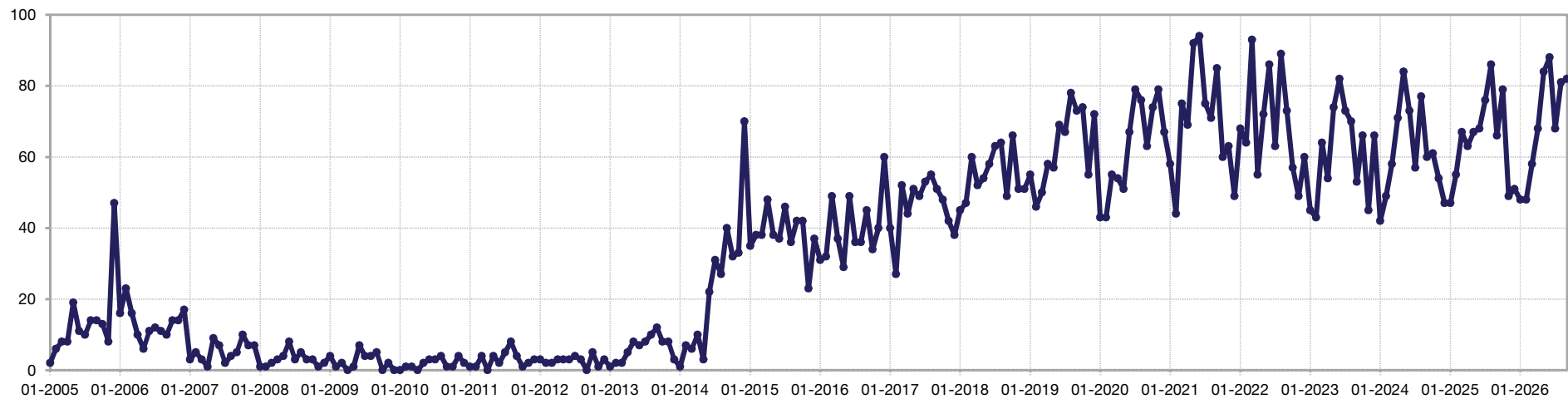


September



Closed Sales		Prior Year	Percent Change
October 2025	79	61	+29.5%
November 2025	49	54	-9.3%
December 2025	51	47	+8.5%
January 2026	48	47	+2.1%
February 2026	48	55	-12.7%
March 2026	58	67	-13.4%
April 2026	68	63	+7.9%
May 2026	84	67	+25.4%
June 2026	88	68	+29.4%
July 2026	68	76	-10.5%
August 2026	81	86	-5.8%
September 2026	82	66	+24.2%
12-Month Avg	67	63	+6.2%

Historical Closed Sales by Month

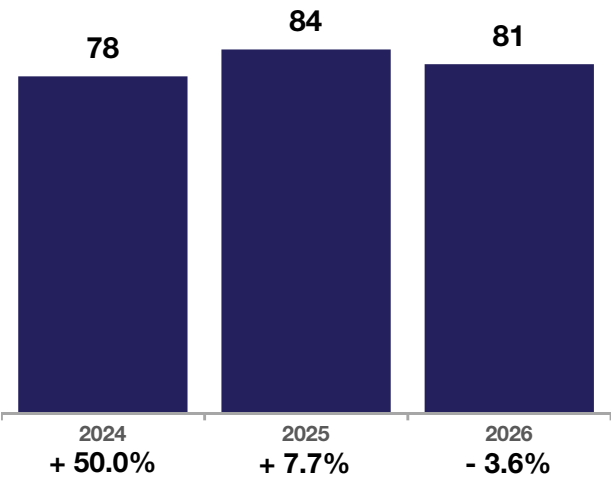


Days on Market Until Sale

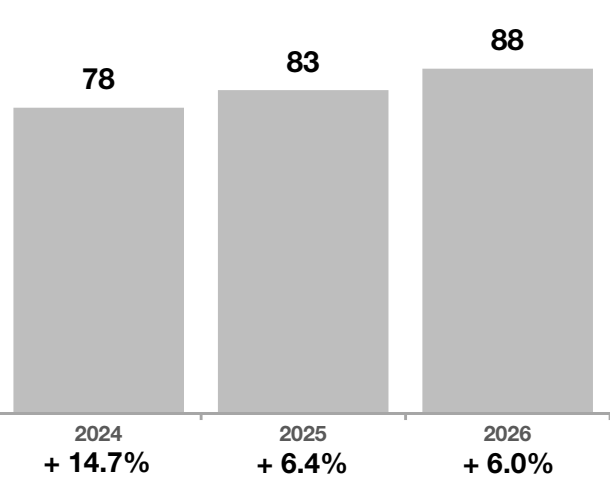
Average number of days between when a property is listed and when an offer is accepted in a given month.



September



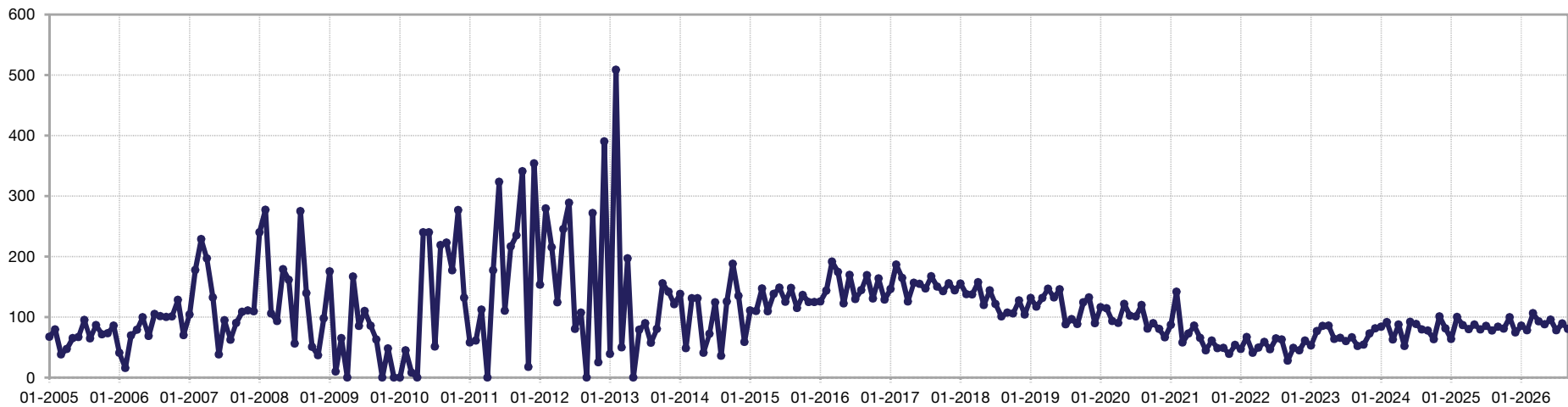
Year to Date



Days on Market		Prior Year	Percent Change
October 2025	81	64	+26.6%
November 2025	100	101	-1.0%
December 2025	74	81	-8.6%
January 2026	86	64	+34.4%
February 2026	78	100	-22.0%
March 2026	106	86	+23.3%
April 2026	93	80	+16.3%
May 2026	88	88	0.0%
June 2026	96	79	+21.5%
July 2026	78	85	-8.2%
August 2026	90	78	+15.4%
September 2026	81	84	-3.6%
12-Month Avg*	88	83	+6.0%

* 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

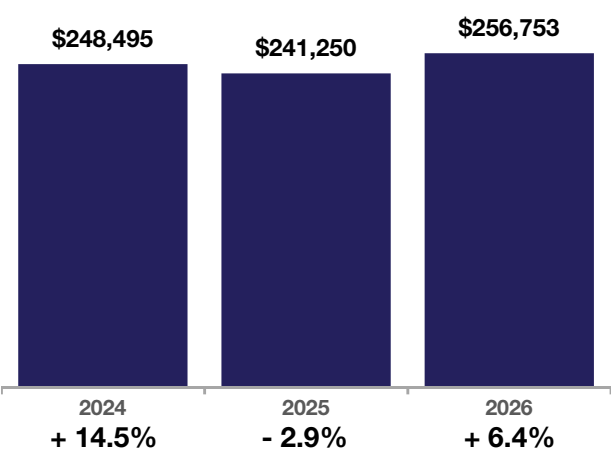


Median Sales Price

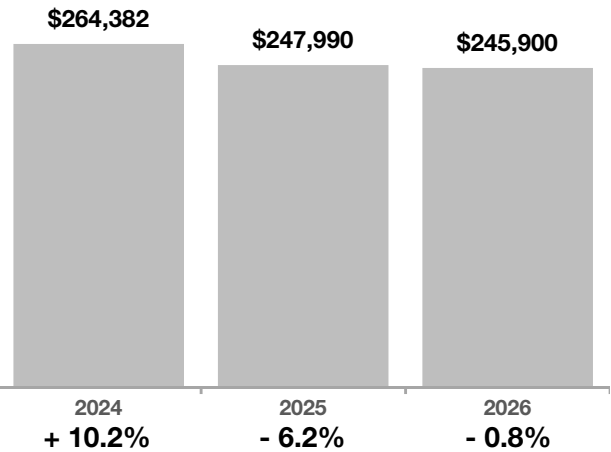
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



September



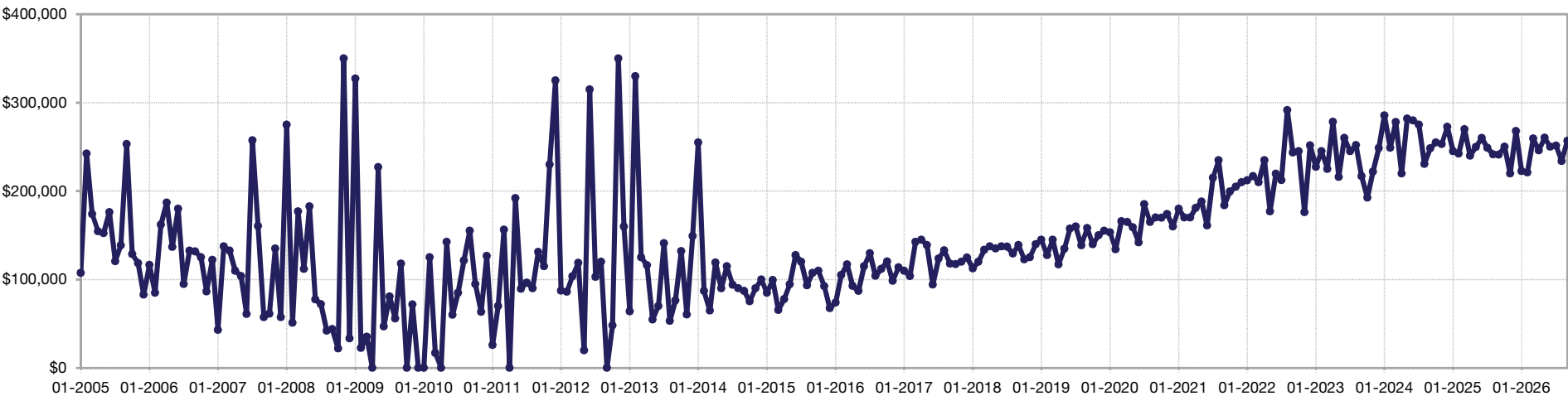
Year to Date



Median Sales Price		Prior Year	Percent Change
October 2025	\$250,000	\$255,000	-2.0%
November 2025	\$219,990	\$253,250	-13.1%
December 2025	\$267,900	\$272,500	-1.7%
January 2026	\$222,500	\$245,000	-9.2%
February 2026	\$221,035	\$242,500	-8.9%
March 2026	\$259,500	\$269,900	-3.9%
April 2026	\$246,000	\$240,000	+2.5%
May 2026	\$260,200	\$249,900	+4.1%
June 2026	\$250,000	\$260,000	-3.8%
July 2026	\$251,450	\$248,875	+1.0%
August 2026	\$234,000	\$241,425	-3.1%
September 2026	\$256,753	\$241,250	+6.4%
12-Month Med*	\$246,700	\$249,900	-1.3%

* 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

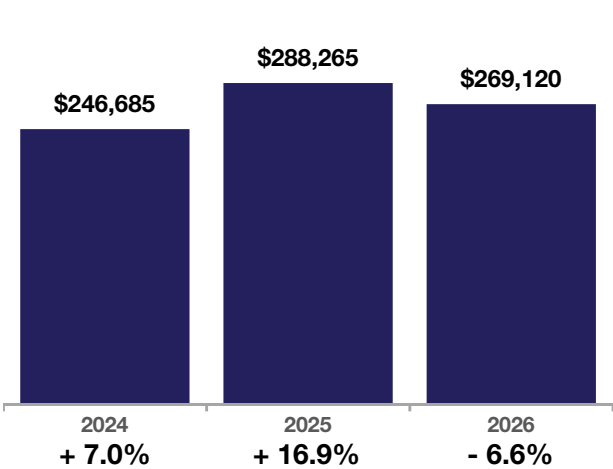


Average Sales Price

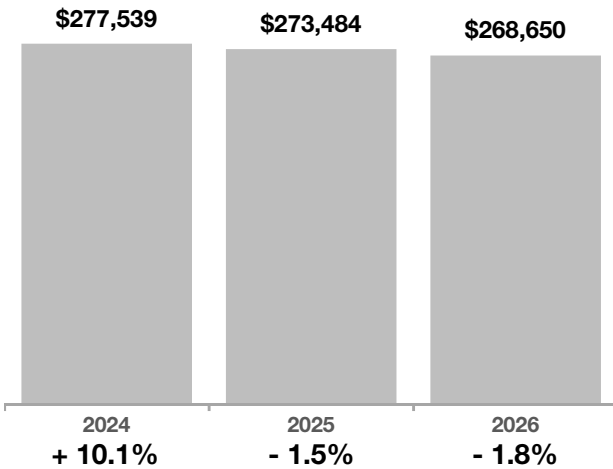
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



September



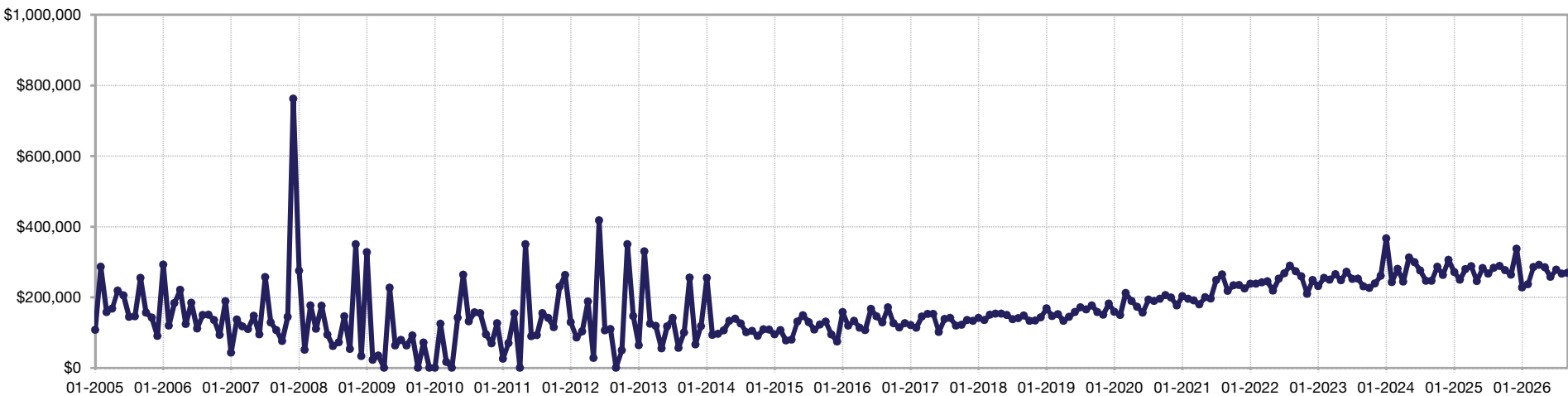
Year to Date



Avg. Sales Price		Prior Year	Percent Change
October 2025	\$276,603	\$286,476	-3.4%
November 2025	\$263,586	\$262,734	+0.3%
December 2025	\$337,282	\$305,686	+10.3%
January 2026	\$227,620	\$271,240	-16.1%
February 2026	\$237,126	\$249,686	-5.0%
March 2026	\$285,364	\$279,340	+2.2%
April 2026	\$291,771	\$288,169	+1.2%
May 2026	\$285,069	\$245,947	+15.9%
June 2026	\$257,963	\$282,744	-8.8%
July 2026	\$277,711	\$266,899	+4.1%
August 2026	\$266,770	\$283,217	-5.8%
September 2026	\$269,120	\$288,265	-6.6%
12-Month Avg*	\$272,999	\$275,867	-1.0%

* 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

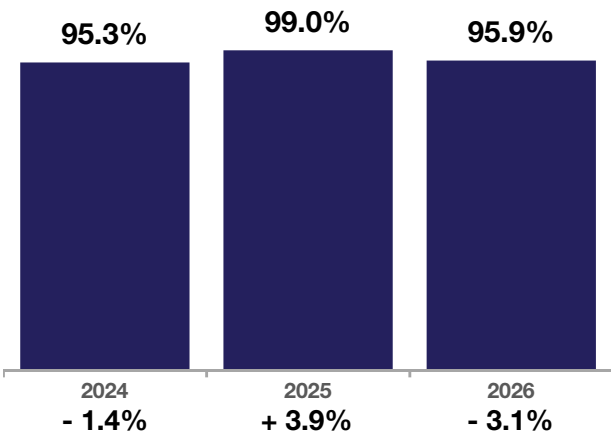


Percent of List Price Received

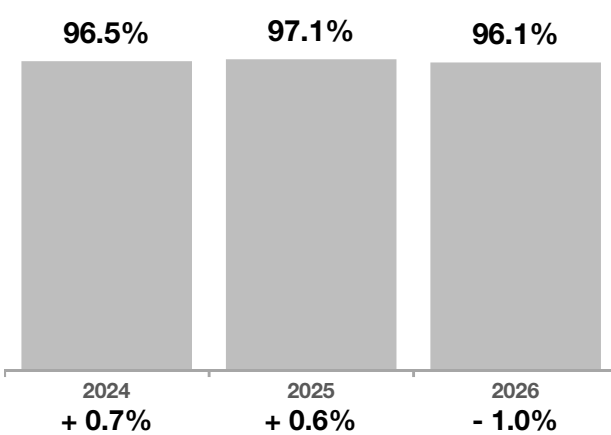
Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



September



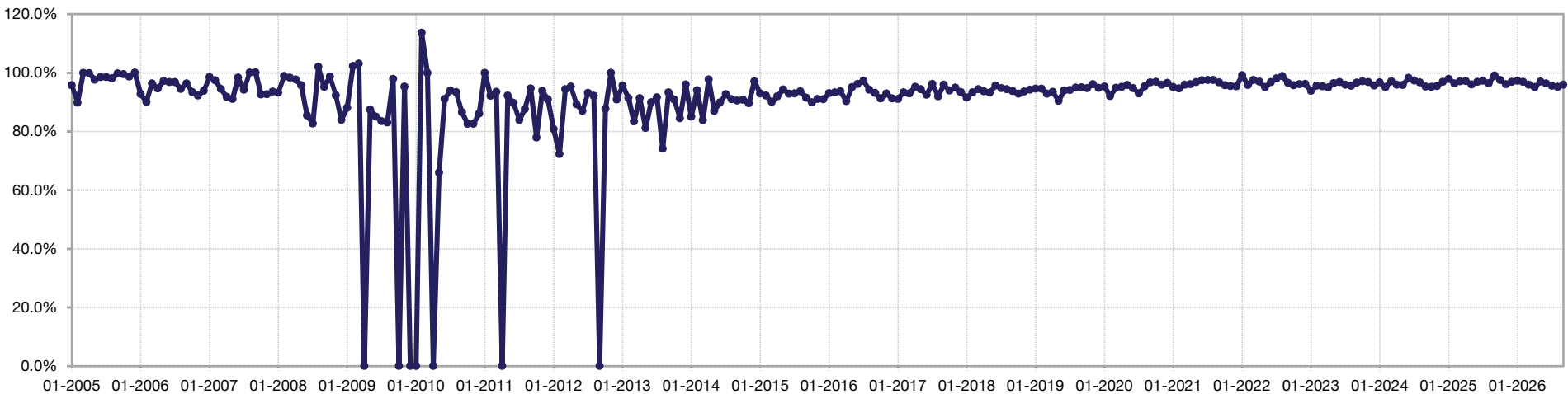
Year to Date



Pct. of List Price Received		Prior Year	Percent Change
October 2025	97.6%	95.2%	+2.5%
November 2025	96.1%	95.5%	+0.6%
December 2025	96.9%	96.9%	0.0%
January 2026	97.2%	97.9%	-0.7%
February 2026	96.9%	96.3%	+0.6%
March 2026	95.9%	97.1%	-1.2%
April 2026	95.1%	97.2%	-2.2%
May 2026	97.0%	96.0%	+1.0%
June 2026	96.4%	96.9%	-0.5%
July 2026	95.6%	97.3%	-1.7%
August 2026	95.2%	96.4%	-1.2%
September 2026	95.9%	99.0%	-3.1%
12-Month Avg*	96.3%	96.8%	-0.5%

* 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

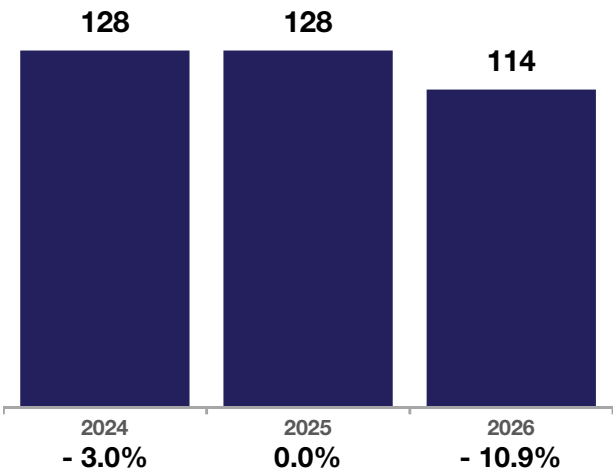


Housing Affordability Index

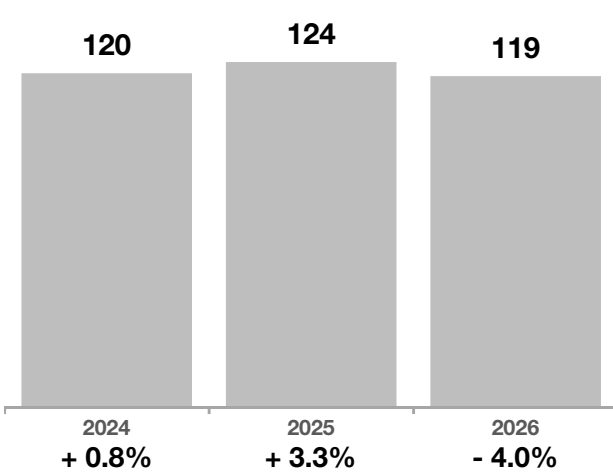
This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.



September

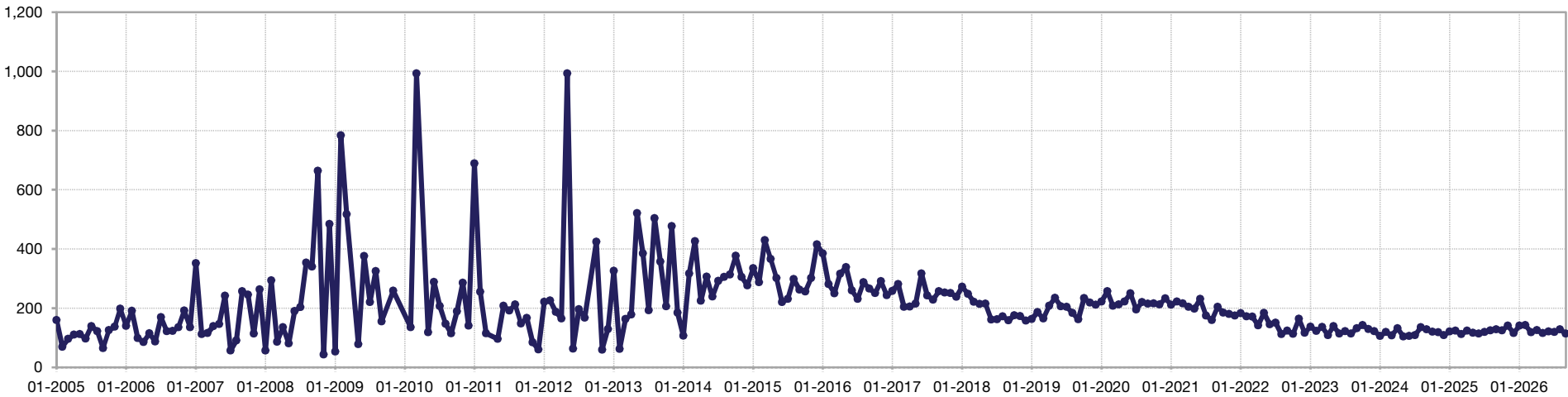


Year to Date



Affordability Index		Prior Year	Percent Change
October 2025	125	120	+4.2%
November 2025	141	118	+19.5%
December 2025	116	109	+6.4%
January 2026	141	121	+16.5%
February 2026	143	124	+15.3%
March 2026	118	112	+5.4%
April 2026	126	124	+1.6%
May 2026	116	117	-0.9%
June 2026	121	114	+6.1%
July 2026	119	119	0.0%
August 2026	128	125	+2.4%
September 2026	114	128	-10.9%
12-Month Avg	126	119	+5.4%

Historical Housing Affordability Index by Month

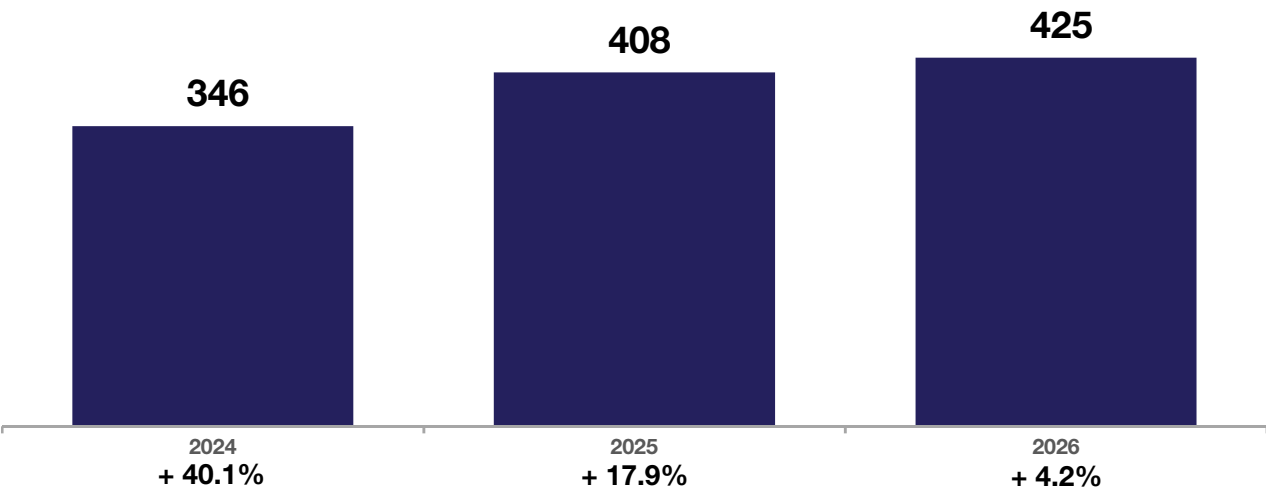


Inventory of Homes for Sale

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



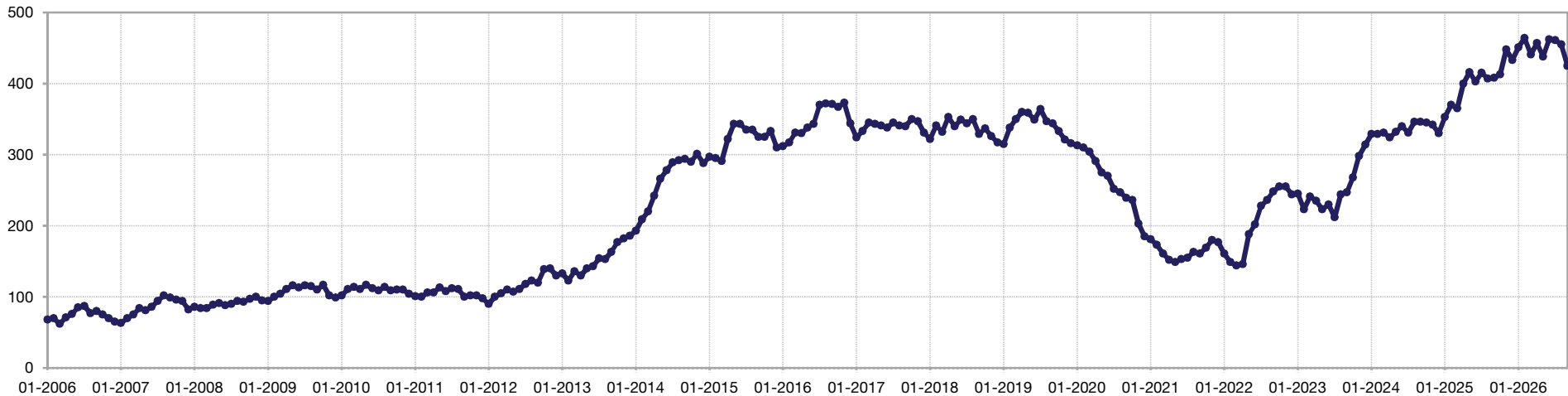
September



Homes for Sale		Prior Year	Percent Change
October 2025	413	345	+19.7%
November 2025	448	342	+31.0%
December 2025	433	330	+31.2%
January 2026	451	353	+27.8%
February 2026	464	370	+25.4%
March 2026	441	365	+20.8%
April 2026	457	400	+14.3%
May 2026	438	416	+5.3%
June 2026	462	403	+14.6%
July 2026	461	415	+11.1%
August 2026	455	407	+11.8%
September 2026	425	408	+4.2%
12-Month Avg*	446	380	+17.4%

* 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

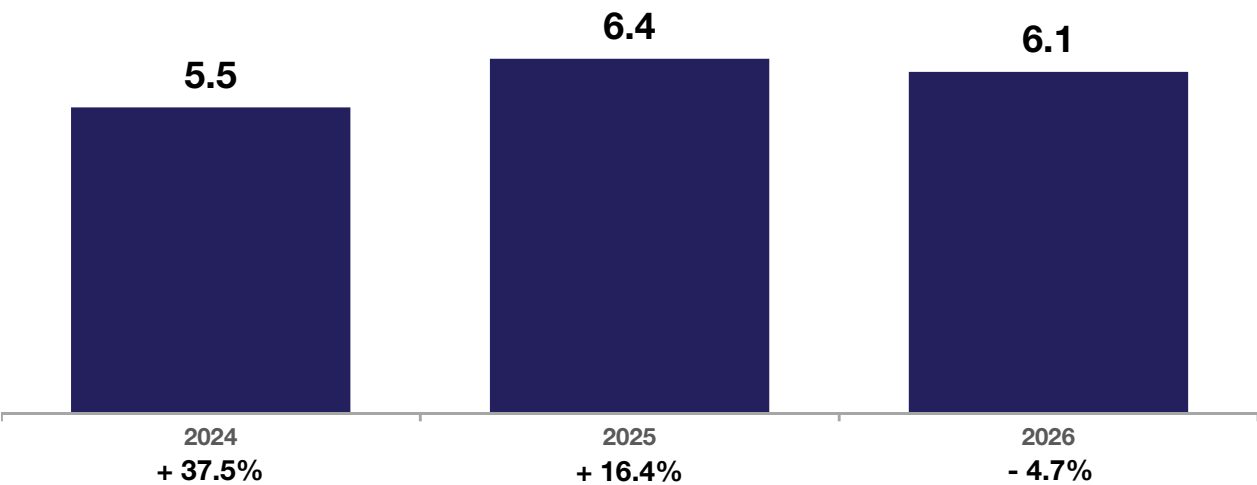


Months Supply of Inventory

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	6.4	5.5	+16.4%
November 2025	7.0	5.5	+27.3%
December 2025	6.7	5.3	+26.4%
January 2026	7.0	5.7	+22.8%
February 2026	7.2	6.0	+20.0%
March 2026	6.6	5.9	+11.9%
April 2026	6.9	6.6	+4.5%
May 2026	6.4	6.8	-5.9%
June 2026	6.8	6.5	+4.6%
July 2026	6.7	6.6	+1.5%
August 2026	6.7	6.3	+6.3%
September 2026	6.1	6.4	-4.7%
12-Month Avg*	6.7	6.1	+9.8%

* 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

