

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 15.1 percent to 685. Pending Sales decreased 13.2 percent to 474. Inventory grew 6.8 percent to 2,174 units.

Median Sales Price was down 2.6 percent to \$379,995. Days on Market increased 12.7 percent to 62 days. Months Supply of Inventory was up 5.4 percent to 3.9 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

- 6.4%	- 2.6%	+ 5.4%
One-Year Change in Closed Sales	One-Year Change in Median Sales Price	One-Year Change in Months Supply

This research tool provided by Canopy MLS covers residential real estate activity in the counties of Chester, Chesterfield, Lancaster and York. 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.



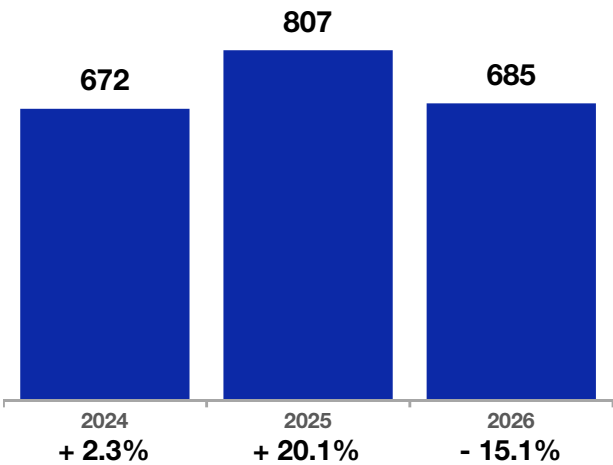
Key Metrics	Historical Sparkbars			09-2025	09-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
	09-2024	09-2025	09-2026						
New Listings				807	685	- 15.1%	7,494	7,494	0.0%
Pending Sales				546	474	- 13.2%	5,296	5,318	+ 0.4%
Closed Sales				592	554	- 6.4%	5,108	5,111	+ 0.1%
Days on Market				55	62	+ 12.7%	50	59	+ 18.0%
Median Sales Price				\$390,000	\$379,995	- 2.6%	\$400,000	\$403,292	+ 0.8%
Average Sales Price				\$467,793	\$445,751	- 4.7%	\$465,115	\$463,926	- 0.3%
Pct. of List Price Received				98.1%	98.1%	0.0%	98.3%	98.4%	+ 0.1%
Housing Affordability Index				95	92	- 3.2%	93	87	- 6.5%
Inventory of Homes for Sale				2,035	2,174	+ 6.8%	--	--	--
Months Supply of Inventory				3.7	3.9	+ 5.4%	--	--	--

New Listings

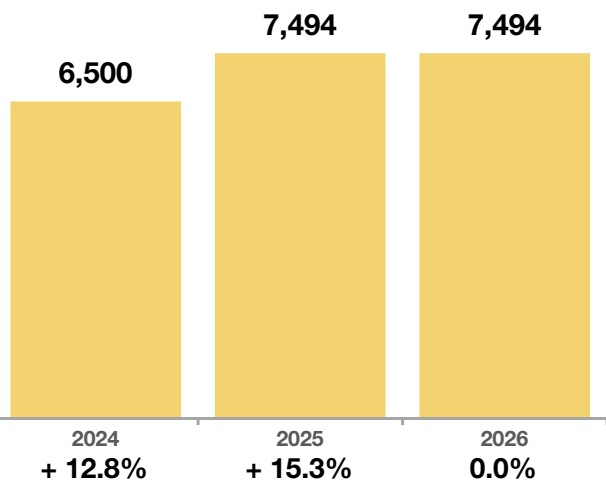
A count of the properties that have been newly listed on the market in a given month.



September

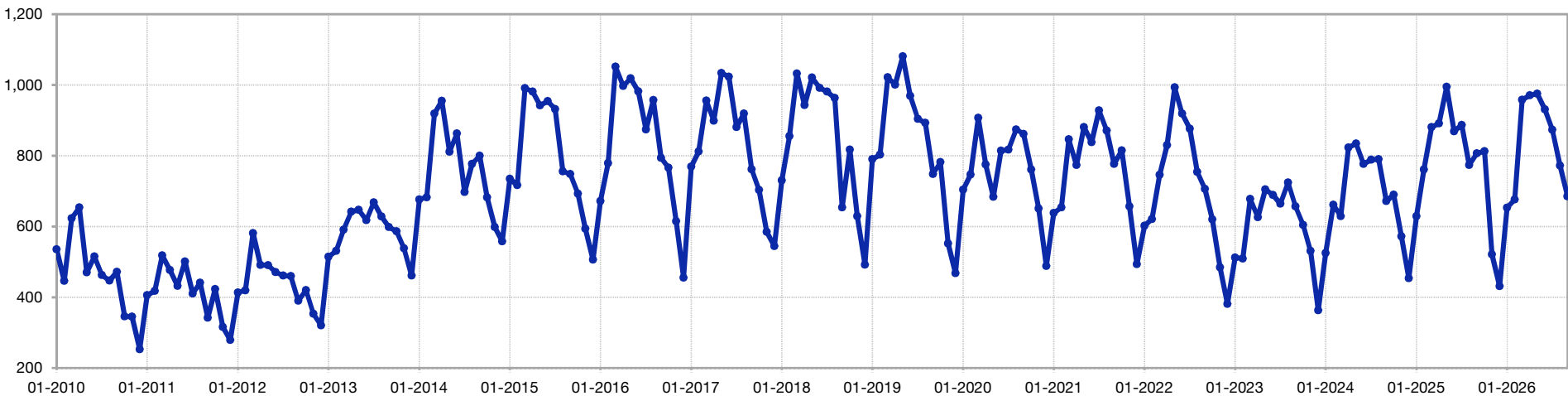


Year to Date



New Listings		Prior Year	Percent Change
October 2025	813	690	+17.8%
November 2025	521	572	-8.9%
December 2025	431	454	-5.1%
January 2026	653	629	+3.8%
February 2026	676	761	-11.2%
March 2026	958	881	+8.7%
April 2026	971	891	+9.0%
May 2026	975	995	-2.0%
June 2026	931	869	+7.1%
July 2026	873	887	-1.6%
August 2026	772	774	-0.3%
September 2026	685	807	-15.1%
12-Month Avg	772	768	+0.5%

Historical New Listings by Month

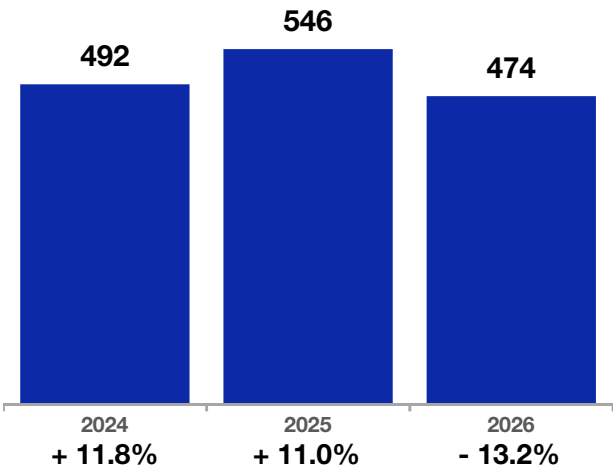


Pending Sales

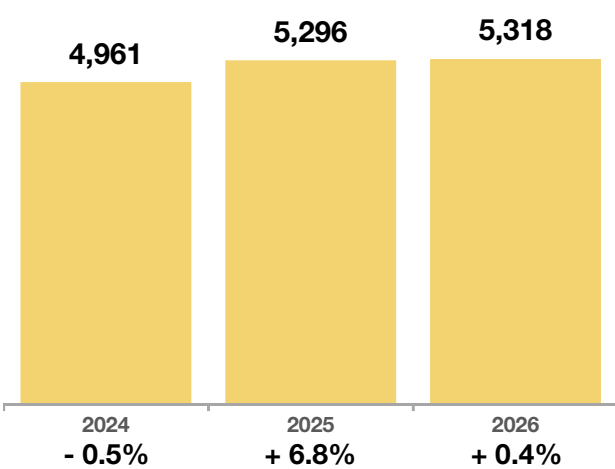
A count of the properties on which offers have been accepted in a given month.



September

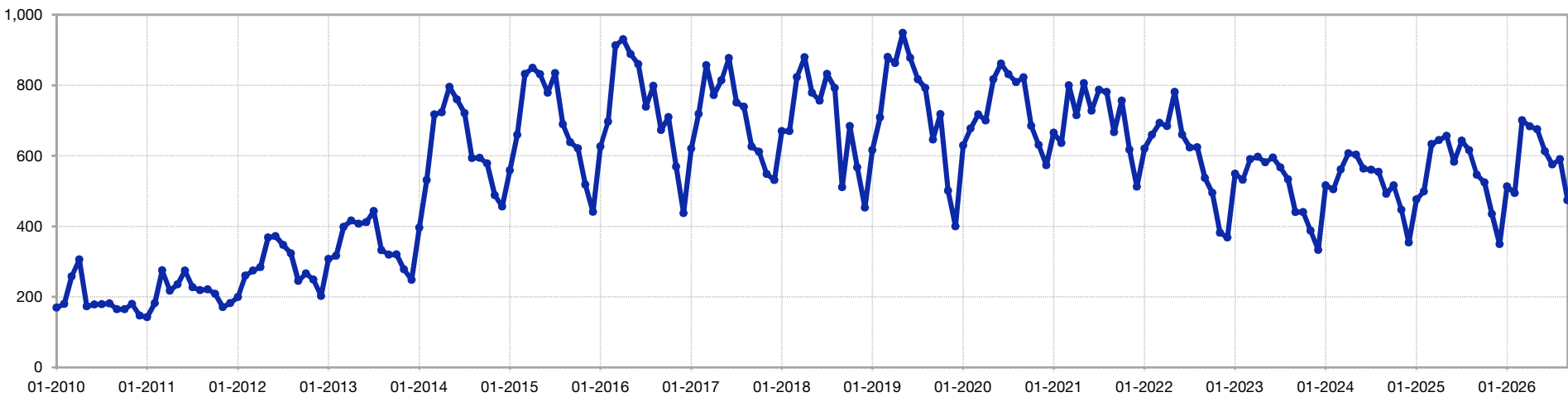


Year to Date



Pending Sales		Prior Year	Percent Change
October 2025	524	516	+1.6%
November 2025	435	447	-2.7%
December 2025	349	354	-1.4%
January 2026	513	476	+7.8%
February 2026	494	499	-1.0%
March 2026	701	633	+10.7%
April 2026	683	644	+6.1%
May 2026	675	656	+2.9%
June 2026	613	583	+5.1%
July 2026	575	643	-10.6%
August 2026	590	616	-4.2%
September 2026	474	546	-13.2%
12-Month Avg	552	551	+0.2%

Historical Pending Sales by Month

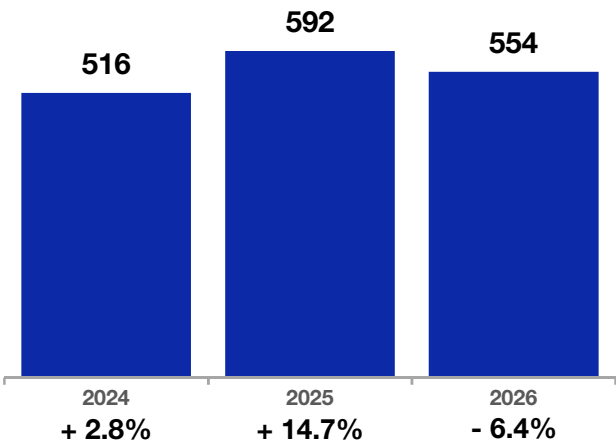


Closed Sales

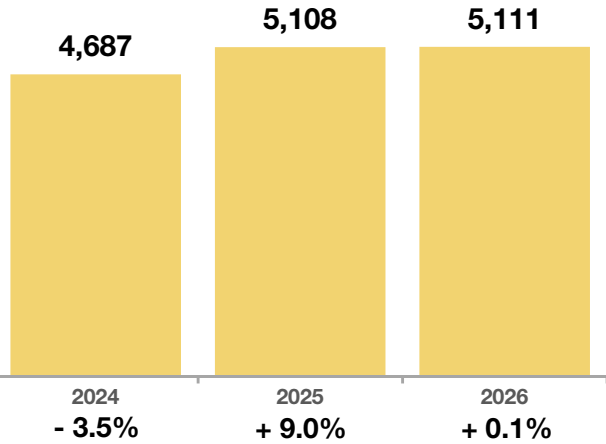
A count of the actual sales that closed in a given month.



September

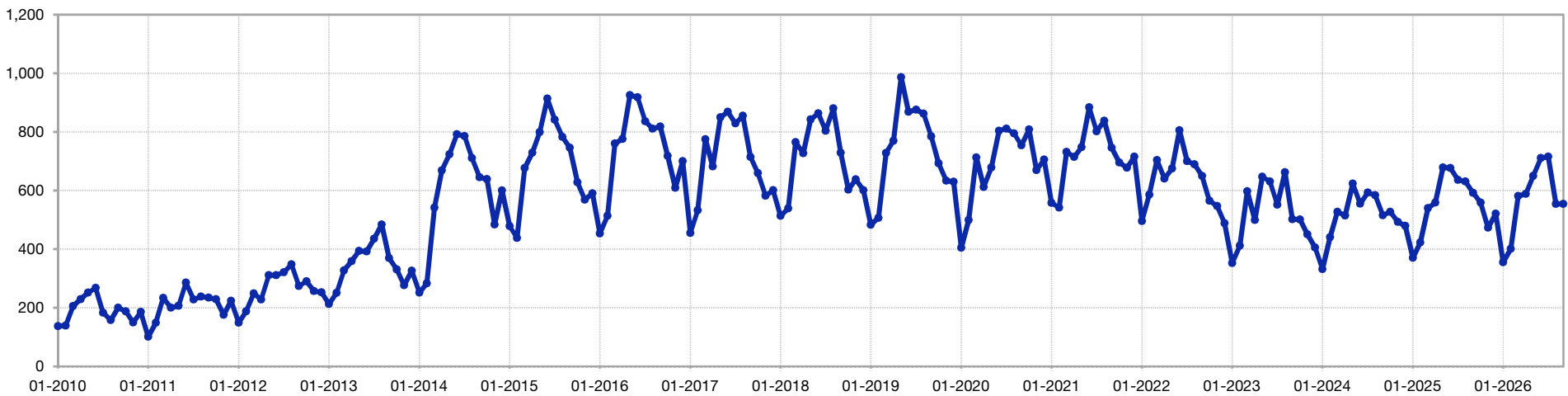


Year to Date



Closed Sales		Prior Year	Percent Change
October 2025	559	527	+6.1%
November 2025	473	493	-4.1%
December 2025	521	480	+8.5%
January 2026	355	371	-4.3%
February 2026	401	423	-5.2%
March 2026	581	540	+7.6%
April 2026	589	559	+5.4%
May 2026	650	679	-4.3%
June 2026	711	677	+5.0%
July 2026	716	636	+12.6%
August 2026	554	631	-12.2%
September 2026	554	592	-6.4%
12-Month Avg	555	551	+0.8%

Historical Closed Sales by Month

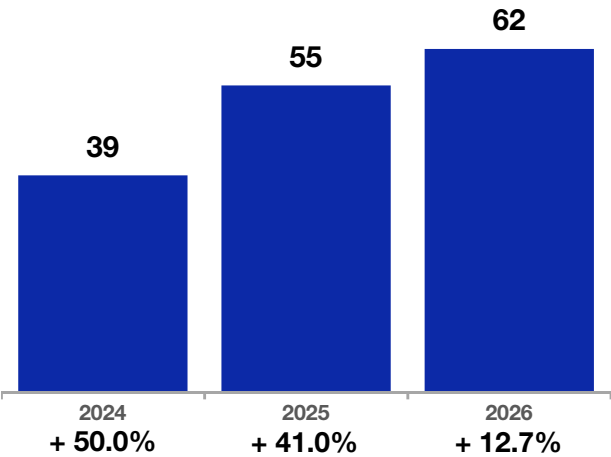


Days on Market Until Sale

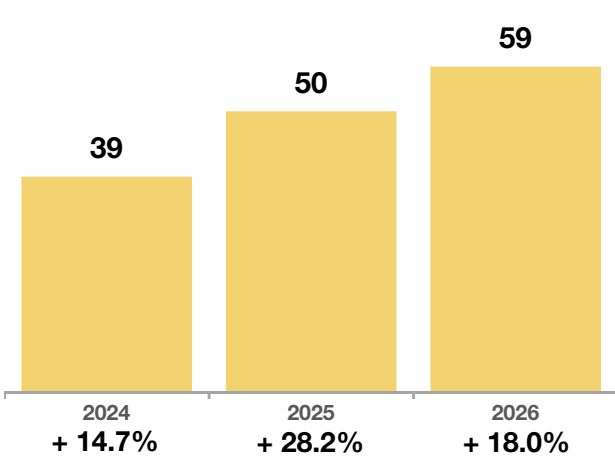
Average number of days between when a property is listed and when an offer is accepted in a given month.



September



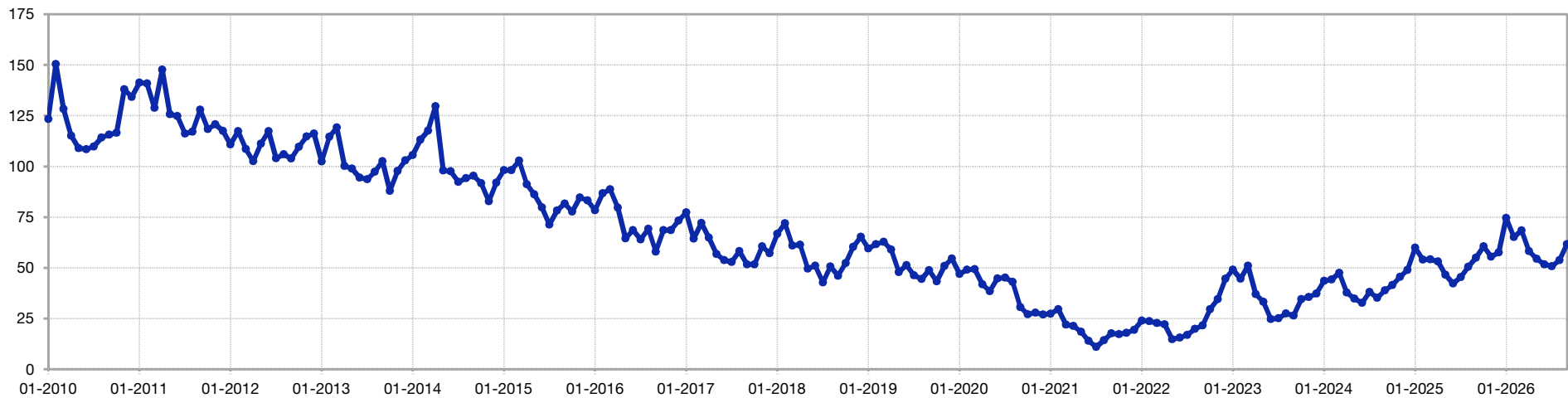
Year to Date



Days on Market		Prior Year	Percent Change
October 2025	61	41	+48.8%
November 2025	56	46	+21.7%
December 2025	58	49	+18.4%
January 2026	75	60	+25.0%
February 2026	65	54	+20.4%
March 2026	68	54	+25.9%
April 2026	58	53	+9.4%
May 2026	54	47	+14.9%
June 2026	52	42	+23.8%
July 2026	51	45	+13.3%
August 2026	54	51	+5.9%
September 2026	62	55	+12.7%
12-Month Avg*	58	49	+18.4%

* 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

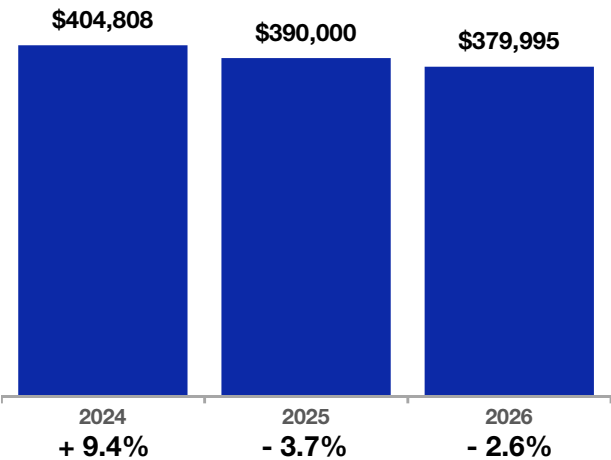


Median Sales Price

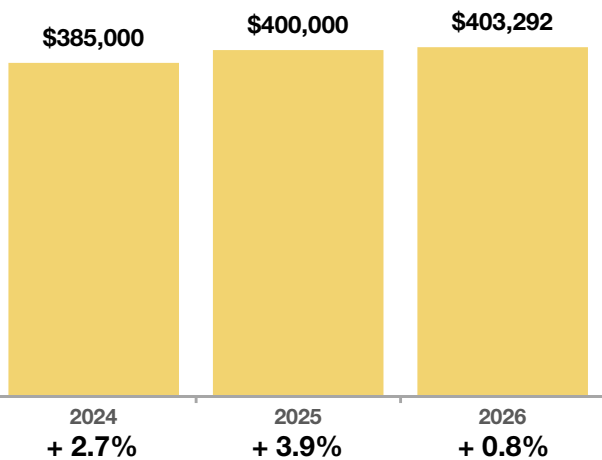
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



September



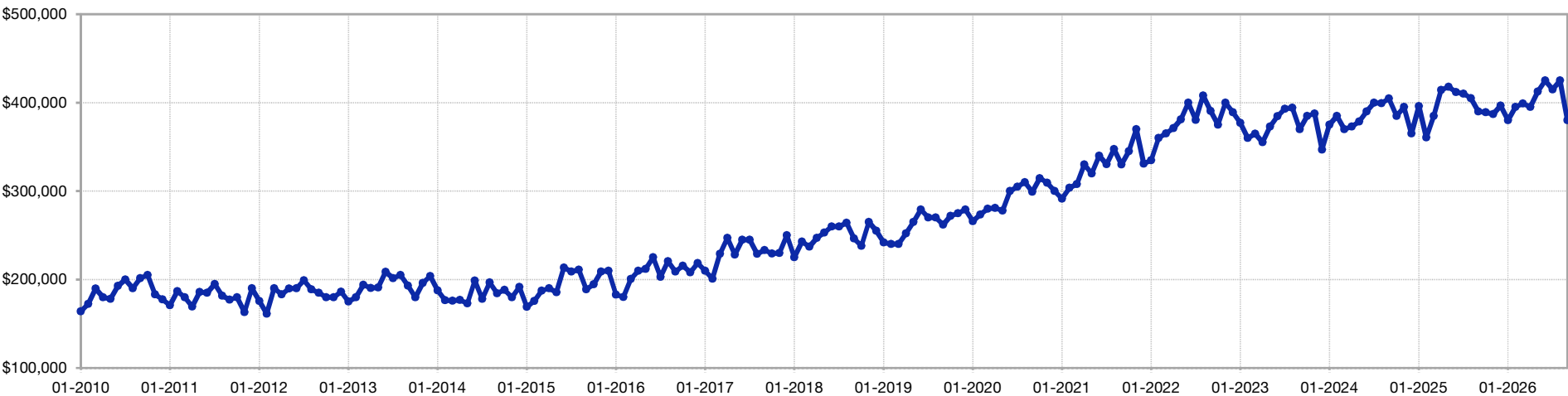
Year to Date



	Median Sales Price	Prior Year	Percent Change
October 2025	\$389,000	\$385,000	+1.0%
November 2025	\$387,000	\$395,000	-2.0%
December 2025	\$396,500	\$364,999	+8.6%
January 2026	\$380,000	\$395,990	-4.0%
February 2026	\$395,000	\$360,500	+9.6%
March 2026	\$399,000	\$385,000	+3.6%
April 2026	\$395,000	\$414,453	-4.7%
May 2026	\$412,425	\$417,950	-1.3%
June 2026	\$425,000	\$412,000	+3.2%
July 2026	\$415,000	\$410,000	+1.2%
August 2026	\$425,000	\$404,900	+5.0%
September 2026	\$379,995	\$390,000	-2.6%
12-Month Med*	\$400,000	\$395,000	+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

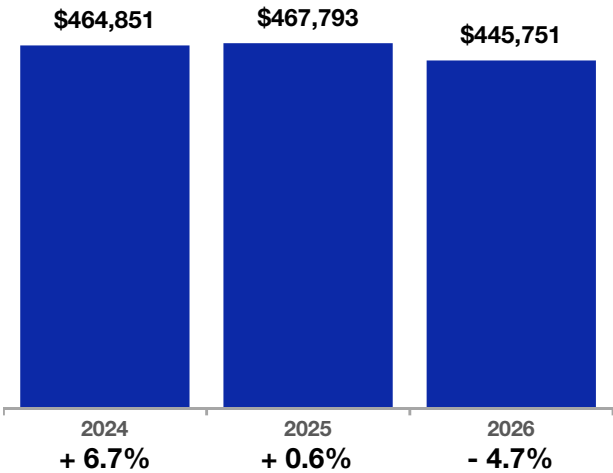


Average Sales Price

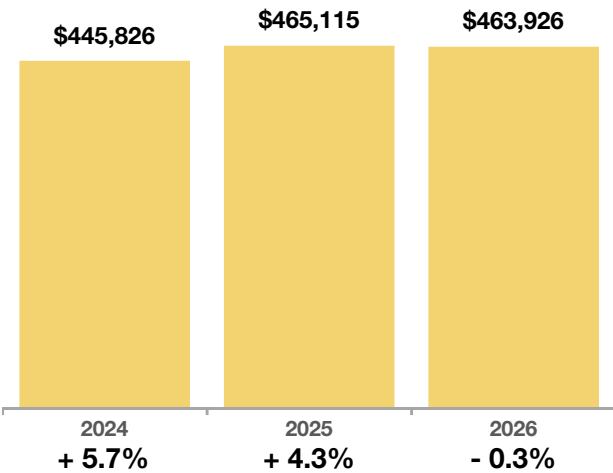
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



September



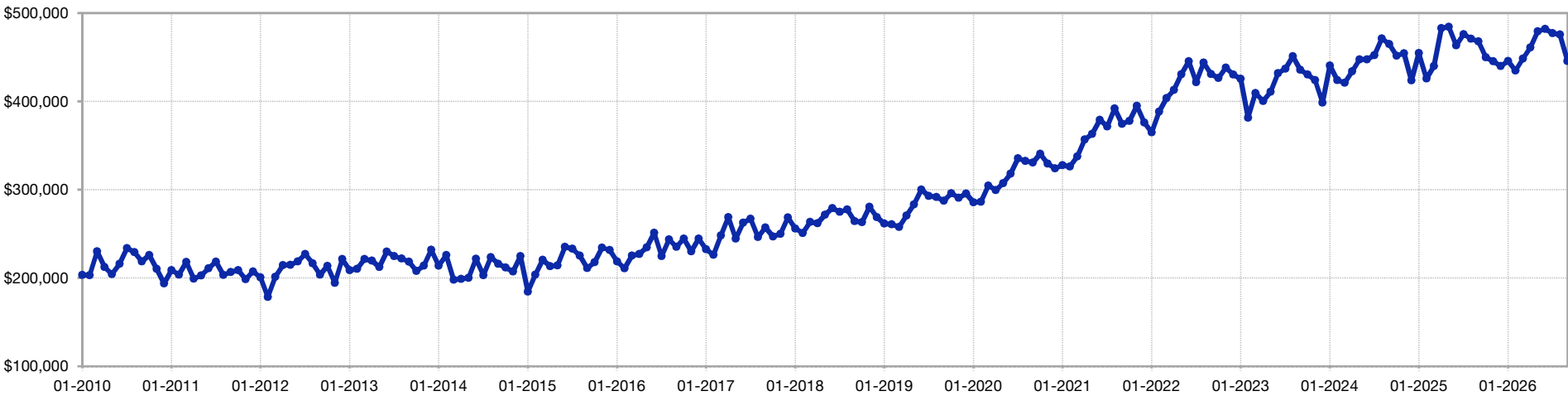
Year to Date



Avg. Sales Price		Prior Year	Percent Change
October 2025	\$449,782	\$451,746	-0.4%
November 2025	\$445,357	\$454,310	-2.0%
December 2025	\$440,116	\$423,738	+3.9%
January 2026	\$445,725	\$454,672	-2.0%
February 2026	\$435,019	\$426,036	+2.1%
March 2026	\$448,311	\$439,905	+1.9%
April 2026	\$461,013	\$482,890	-4.5%
May 2026	\$479,356	\$484,427	-1.0%
June 2026	\$481,938	\$463,470	+4.0%
July 2026	\$477,190	\$475,967	+0.3%
August 2026	\$475,735	\$470,868	+1.0%
September 2026	\$445,751	\$467,793	-4.7%
12-Month Avg*	\$457,108	\$457,985	-0.2%

* 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

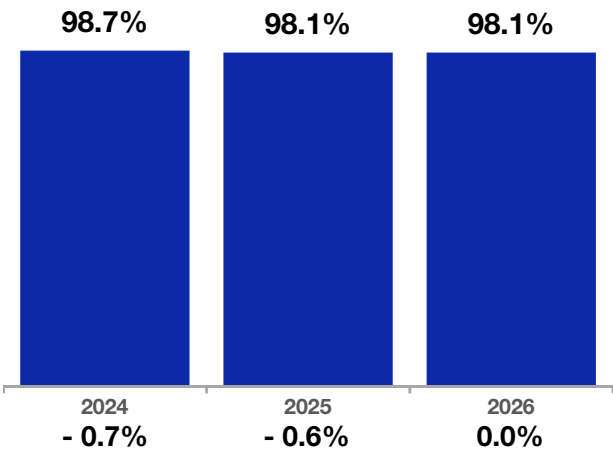


Percent of List Price Received

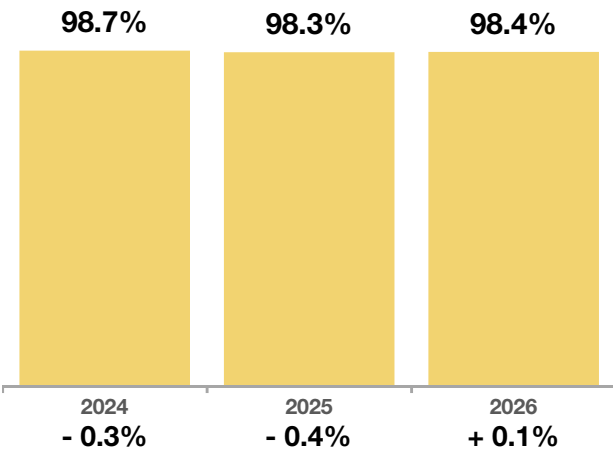
Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



September



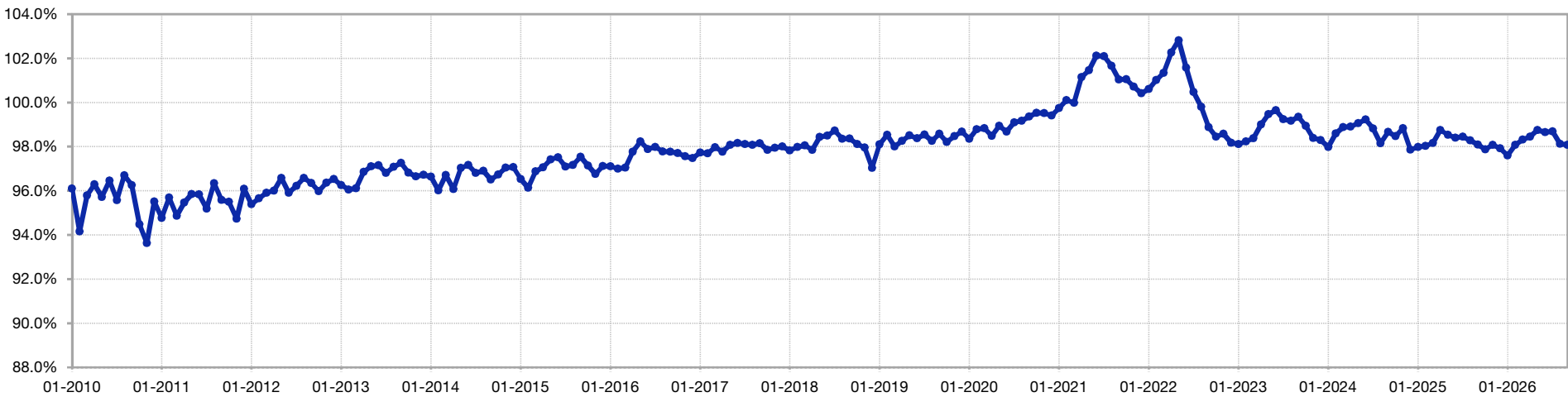
Year to Date



Pct. of List Price Received		Prior Year	Percent Change
October 2025	97.9%	98.5%	-0.6%
November 2025	98.1%	98.8%	-0.7%
December 2025	97.9%	97.9%	0.0%
January 2026	97.6%	98.0%	-0.4%
February 2026	98.1%	98.0%	+0.1%
March 2026	98.3%	98.2%	+0.1%
April 2026	98.4%	98.7%	-0.3%
May 2026	98.8%	98.5%	+0.3%
June 2026	98.7%	98.4%	+0.3%
July 2026	98.7%	98.4%	+0.3%
August 2026	98.1%	98.3%	-0.2%
September 2026	98.1%	98.1%	0.0%
12-Month Avg*		98.3%	0.0%

* 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

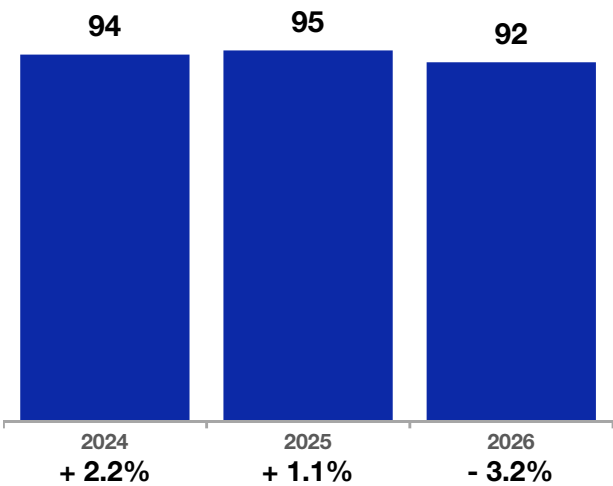


Housing Affordability Index

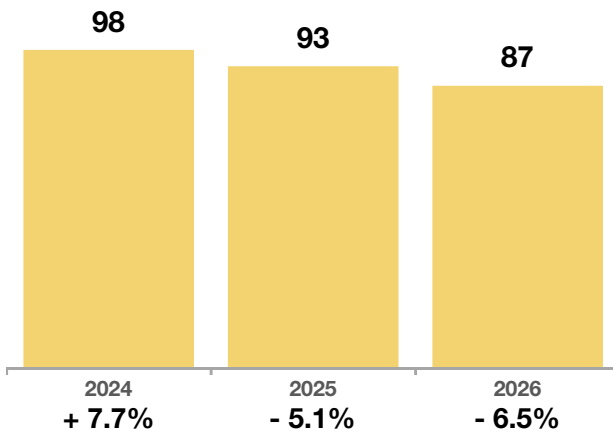


This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.

September

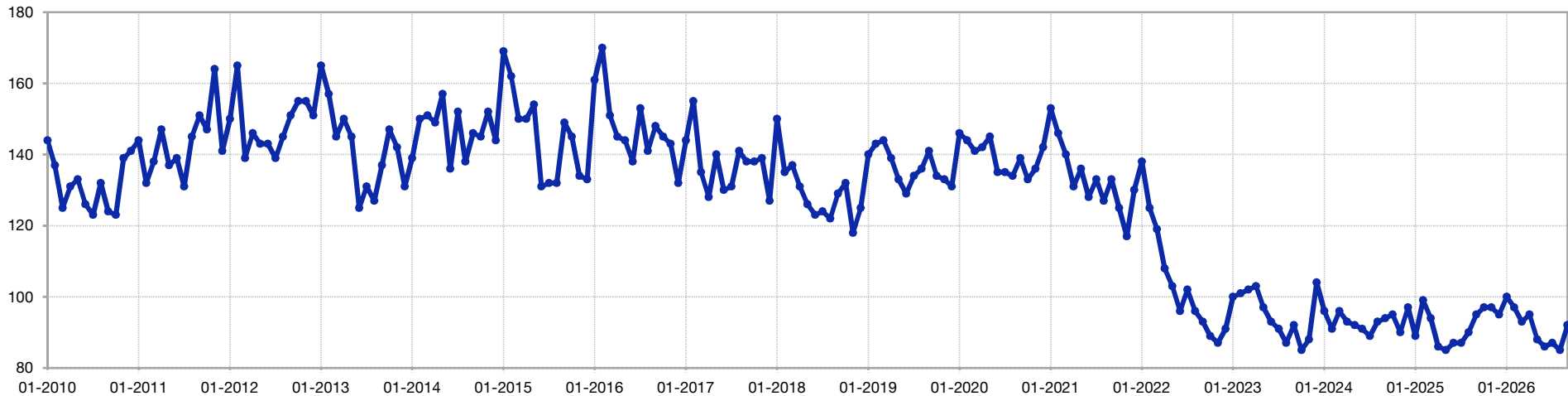


Year to Date



Affordability Index		Prior Year	Percent Change
October 2025	97	95	+2.1%
November 2025	97	90	+7.8%
December 2025	95	97	-2.1%
January 2026	100	89	+12.4%
February 2026	97	99	-2.0%
March 2026	93	94	-1.1%
April 2026	95	86	+10.5%
May 2026	88	85	+3.5%
June 2026	86	87	-1.1%
July 2026	87	87	0.0%
August 2026	85	90	-5.6%
September 2026	92	95	-3.2%
12-Month Avg		93	+1.6%

Historical Housing Affordability Index by Month

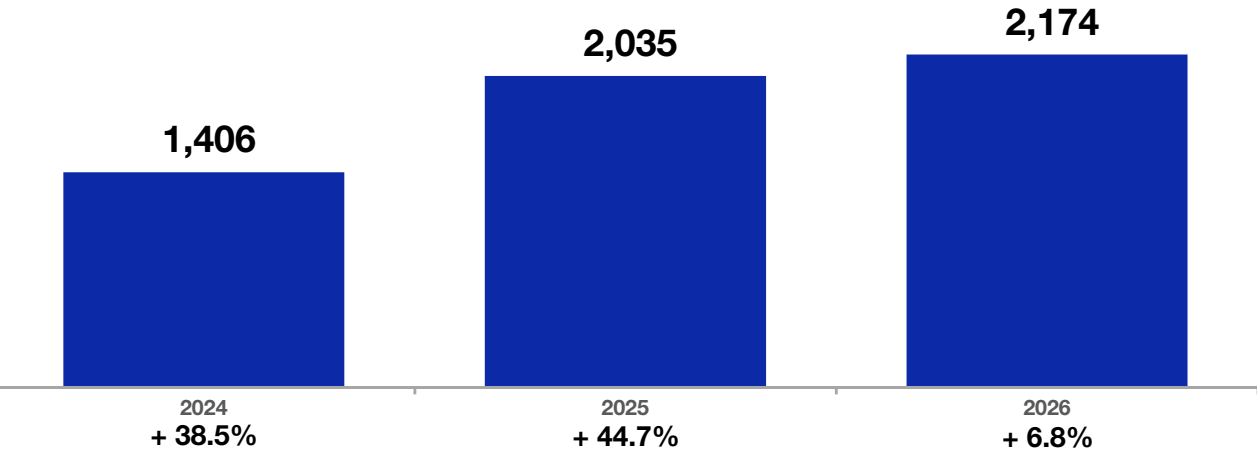


Inventory of Homes for Sale

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



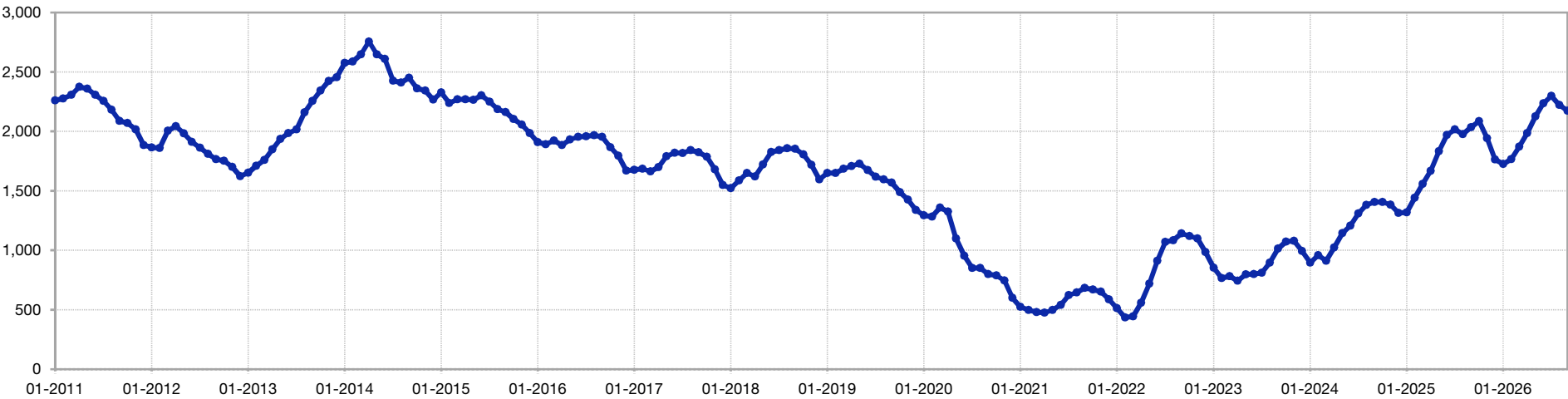
September



Homes for Sale		Prior Year	Percent Change
October 2025	2,085	1,406	+48.3%
November 2025	1,942	1,383	+40.4%
December 2025	1,763	1,313	+34.3%
January 2026	1,725	1,319	+30.8%
February 2026	1,766	1,442	+22.5%
March 2026	1,871	1,557	+20.2%
April 2026	1,986	1,667	+19.1%
May 2026	2,126	1,833	+16.0%
June 2026	2,236	1,969	+13.6%
July 2026	2,299	2,016	+14.0%
August 2026	2,223	1,977	+12.4%
September 2026	2,174	2,035	+6.8%
12-Month Avg*	2,016	1,660	+21.4%

* 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

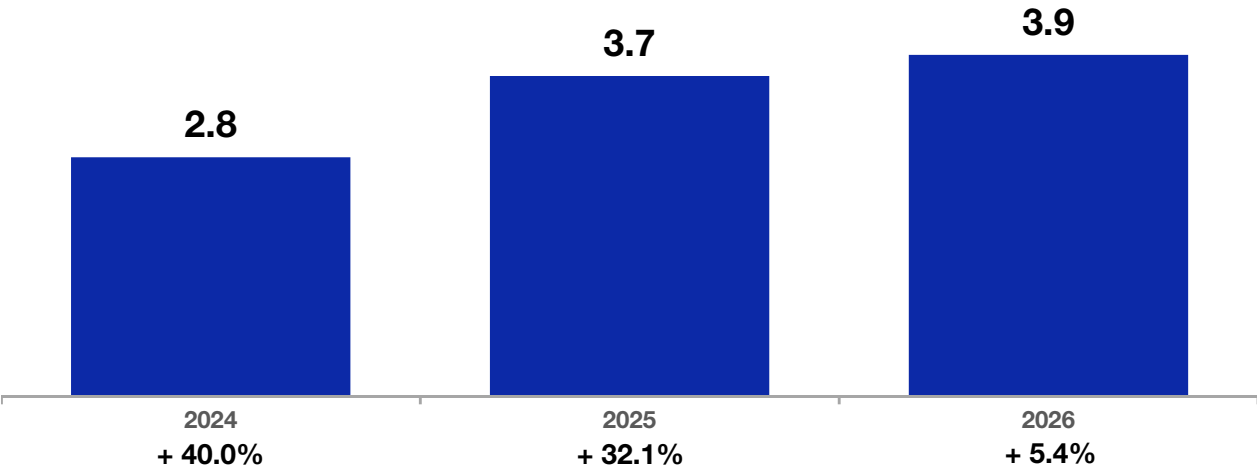


Months Supply of Inventory

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	3.8	2.7	+40.7%
November 2025	3.5	2.7	+29.6%
December 2025	3.2	2.5	+28.0%
January 2026	3.1	2.5	+24.0%
February 2026	3.2	2.8	+14.3%
March 2026	3.3	3.0	+10.0%
April 2026	3.5	3.2	+9.4%
May 2026	3.8	3.4	+11.8%
June 2026	4.0	3.7	+8.1%
July 2026	4.1	3.7	+10.8%
August 2026	4.0	3.6	+11.1%
September 2026	3.9	3.7	+5.4%
12-Month Avg*	3.6	3.1	+16.1%

* 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

