

USREO PARTNERS

Market Trends *Report*



May 2026
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MARKET AREAS

AREA	COUNTIES INCLUDED	PROVIDED BY
<u>Phoenix, AZ</u>	Maricopa, Pinal	Ramiro Gonzalez
<u>Orange County, CA</u>	Orange	Jennifer Blake
<u>Los Angeles, CA</u>	Los Angeles	Jeff Russell
<u>Riverside/San Bernardino, CA</u>	Riverside, San Bernardino	Monica Hill
<u>Sacramento, CA</u>	El Dorado, Placer, Sacramento, Yolo	Serina Lowden
<u>San Diego</u>	San Diego	Joe Gummerson
<u>San Francisco, CA</u>	Alameda, Contra Costa, Marin, San Francisco, San Mateo	Anh Pham
<u>Miami, FL</u> (Single Family-Detached)	Broward, Miami-Dade, Palm Beach (Single Family-Detached)	Eddie Blanco
<u>Miami, FL</u> (Townhomes/Condos)	Broward, Miami-Dade, Palm Beach (Townhomes/Condos)	Eddie Blanco
<u>Orlando, FL</u>	Lake, Orange, Osceola, Seminole	Joe Doher
<u>Tallahassee, FL</u>	Gadsden, Jefferson, Leon, Wakulla	Danielle Galvin
<u>Tampa Bay, FL</u>	Hernando, Hillsborough, Pasco, Pinellas	Peter Chicouris

MARKET AREAS

AREA	COUNTIES INCLUDED	PROVIDED BY
<u>Metro Atlanta, GA</u>	Cherokee, Clayton, Cobb, Coweta, Bartow, Dekalb, Douglas, Fayette, Forsyth, Fulton, Gwinnett, Henry, Rockdale	Nikki Crowder
<u>Chicago, IL</u>	Cook, DeKalb, DuPage, Grundy, Kane, Kendall, Lake, McHenry, Will	Patti Furman
<u>Baltimore, MD</u>	Anne Arundel, Baltimore, Carroll, Harford, Howard, Queen Anne's	Melanie Gamble
<u>So. Maryland, MD</u>	Prince George's, Montgomery, Charles, Calvert	Melanie Gamble
<u>Detroit, MI</u>	Macomb, Oakland, Wayne	Sam Hantosh
<u>Minneapolis, MN</u>	Anoka, Carver, Chisago, Dakota, Hennepin, Isanti, Ramsey, Scott, Sherburne, Washington, Wright	Scott Rodman
<u>St. Louis, MO</u>	Crawford, Franklin, Jefferson, Lincoln, St. Charles, St. Louis, Warren	Cathy Davis
<u>Newark, NJ</u>	Essex, Hunterdon, Morris, Somerset, Sussex, Union	Nick Verdi
<u>Catskills Region, NY</u>	Sullivan	Lee A. Raphael
<u>Hudson Valley, NY</u>	Dutchess, Ulster, Orange, Putnam, Rockland, Westchester, Columbia	Lee A. Raphael

MARKET AREAS

AREA	COUNTIES INCLUDED	PROVIDED BY
<u>New York, NY</u>	<u>Naussau, Suffolk, Queens</u> (presented in separate charts)	Todd Yovino
<u>Las Vegas, NV</u>	Clark	Brandy White Elk
<u>Philadelphia, PA</u>	Bucks, Chester, Delaware, Montgomery, Philadelphia	Mitchell Cohen
<u>South Central, PA</u>	Adams, Berks, Cumberland, Dauphin, Lancaster, Lebanon, York	Mark Rebert
<u>Lehigh Valley, PA</u>	Allentown, Bethlehem, Easton	Mark Rebert
<u>Dallas, TX</u>	Collin, Dallas, Denton, Ellis, Hood, Hunt, Johnson, Kaufman, Parker, Rockwall, Somervell, Tarrant, Wise	Sharon Bartlett
<u>Houston, TX</u>	Austin, Brazoria, Chambers, Fort Bend, Galveston, Harris, Liberty, Montgomery, Waller	Derek Montes
<u>Seattle/Tacoma, WA</u>	King, Pierce, Snohomish	Ed Laine
<u>Milwaukee, WI</u>	Milwaukee, Waukesha, Ozaukee, Washington, Racine, Kenosha, Walworth, Sheboygan, Dodge, Manitowoc, Fond Du Lac, Rock, Calumet, Buffalo, Jackson, Monroe, Veron, Crawford, Trempealeau, Jefferson	James Harris
<u>Washington, DC</u>	District of Columbia	Melanie Gamble



MONTHLY MARKET TRENDS PHOENIX, ARIZONA



MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	22,076	↓	22,468
NEW LISTINGS	8,280	↓	10,487
PENDING LISTINGS	7,890	↓	8,300
AVERAGE LIST PRICE	\$670,343	↓	\$679,061
REO LISTINGS	132	↓	214
MONTHS SUPPLY	3.22	↔	3.22
LIST TO SALES PRICE	91%	↓	97.44%
MEDIAN SALES PRICE	\$609,994	↑	\$449,998
SALES CLOSED	6,794	↓	8,854
AVERAGE DAYS ON MARKET	81	↓	82

Additional Market Data: The Maricopa and Pinal County housing markets continue to move toward a more balanced environment. Inventory levels remain higher than a year ago, giving buyers more choices and reducing the competitive pressure seen during the peak seller's market years. While active listings have increased, demand remains steady, supported by population growth, employment opportunities, and continued migration into the region.



MONTHLY MARKET TRENDS ORANGE COUNTY, CALIFORNIA

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MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	3,951	↓	4,266
NEW LISTINGS	1,387	↓	1,595
PENDING LISTINGS	860	↓	982
AVERAGE LIST PRICE	\$1,269,000	↓	\$1,300,000
REO LISTINGS	0	↓	5
MONTHS SUPPLY	2.95	↑	2.6
LIST TO SALES PRICE	99.7%	↑	99%
MEDIAN SALES PRICE	\$1,194,000	↓	\$1,275,000
SALES CLOSED	1,771	↓	1,847
AVERAGE DAYS ON MARKET	32	↓	36

Additional Market Data: Orange County remains highly competitive, though the market is slightly more balanced. Over the past 30 days, mortgage rates have remained relatively stable; however, they are still elevated, which continues to impact buyer affordability. As a result, homes are staying on the market a bit longer, giving buyers increased negotiating power. Closed sales volume has been somewhat sluggish, down approximately 5% compared to this time last year. Seller concessions are becoming more prevalent, particularly in the form of rate buy-downs and seller-paid credits, which are increasingly common in today's market.

Information provided for this market by **Jennifer Blake** at **LuXre Realty**.

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MONTHLY MARKET TRENDS LOS ANGELES, CALIFORNIA

MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	52,656	↑	52,386
NEW LISTINGS	6,497	↓	6,898
PENDING LISTINGS	1,600	↑	341
AVERAGE LIST PRICE	\$1,753,392	↓	\$1,862,648
ACTIVE REO LISTINGS	19	↑	12
MONTHS SUPPLY	13	↔	13
LIST TO SALES PRICE	78%	↑	74%
MEDIAN SALES PRICE	\$941,000	↑	\$930,000
SALES CLOSED	3,966	↓	4,065
AVERAGE DAYS ON MARKET	41	↔	41

Additional Market Data: May showed encouraging signs of renewed buyer engagement despite a market that remains heavily supplied. Pending sales surged to 1,600 from just 341 in April, suggesting stronger demand heading into summer, even as closed sales eased slightly to 3,966 from 4,065. The median sales price rose to \$941,000 from \$930,000, while the average list price pulled back to \$1,753,392 from \$1,860,648, an indication that sellers are pricing more realistically. That recalibration is also reflected in the list-to-sale price ratio, improving to 78% from 74%. Inventory remains elevated at 52,656 active listings and 13 months of supply, keeping us firmly in buyer 's-market territory, though new listings slowed to 6,497 from 6,898, which may help absorb standing inventory over time. Days on market held steady at 41, and distressed activity remains minimal, with only 19 REO listings. Overall, the data points to a market finding its footing: buyers have leverage and selection, but well-priced homes are attracting offers, and the jump in pendings suggests firmer closed-sales numbers ahead.

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MONTHLY MARKET TRENDS



RIVERSIDE/SAN BERNARDINO, CALIFORNIA

MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	14,837	↓	15,225
NEW LISTINGS	498	↓	512
PENDING LISTINGS	6,458	↑	5,595
AVERAGE LIST PRICE	\$691,461	↑	\$680,383
ACTIVE REO LISTINGS	151	↑	141
MONTHS SUPPLY	3	↓	4
LIST TO SALES PRICE	96%	↔	96%
MEDIAN SALES PRICE	\$569,237	↓	\$589,265
SALES CLOSED	4,076	↑	3,430
AVERAGE DAYS ON MARKET	66	↓	69

Additional Market Data: In May 2026, the housing markets in Riverside and San Bernardino counties showed signs of strengthening as the region moved into the summer selling season. Active listings and new listings declined slightly, indicating continued inventory constraints, while pending sales and closed sales both increased, reflecting improved buyer activity and transaction volume. The average list price posted a modest increase, although the median sales price softened slightly, suggesting buyers remain price-conscious and are favoring competitively priced properties. Months of inventory declined to approximately three months, reinforcing a market that continues to favor sellers despite moderating conditions. Average days on market improved from prior months, decreasing to approximately 66 days, indicating a faster pace of absorption. Overall, the market remains stable with balanced growth, supported by limited inventory, steady buyer demand, and increasing sales activity. Current trends suggest a healthy summer market with continued opportunities for both buyers and sellers throughout the Inland Empire.

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MONTHLY MARKET TRENDS SAN DIEGO, CALIFORNIA

MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	5,746	↑	5,644
NEW LISTINGS	1,820	↓	2,068
PENDING LISTINGS	1,611	↓	1,642
AVERAGE LIST PRICE	\$1,861,950	↑	\$1,655,630
ACTIVE REO LISTINGS	12	↓	14
MONTHS SUPPLY	4	↔	4
LIST TO SALES PRICE	97%	↑	96%
MEDIAN SALES PRICE	\$1,077,750	↓	\$1,095,000
SALES CLOSED	1,408	↓	1,504
AVERAGE DAYS ON MARKET	23	↓	29

Additional Market Data: The San Diego residential market stabilized in May, characterized by a continued, but slow, buildup of Active inventory. Total Active Listings reached 5,746, while New Listings eased by 12% to 1,820. A notable trend this month is the gap between list price and market values: the Average Asking Price climbed significantly to \$1,861,950, likely pulled upward by high-end inventory, yet the Median Sale Price saw a slight correction to \$1,077,750. This spread suggests that while luxury properties remain ambitious in their pricing, the broader buyer pool is adhering to tighter valuations.

For Servicers, the REO segment remains deceptive. While reported Active REO listings decreased slightly to 12, this figure masks a substantial volume of distressed assets currently held off-market. Dozens of properties have cleared the foreclosure process but have yet to be listed as Active, creating a significant "shadow" supply that is accumulating in the pipeline. With Days on Market tightening to 23 and the Sale Price-to-Asking Price ratio recovering to 97%, demand remains efficient for correctly priced inventory.



MONTHLY MARKET TRENDS SAN FRANCISCO, CALIFORNIA

MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	8,312	↑	5,518
NEW LISTINGS	2,834	↑	2,156
PENDING LISTINGS	1,324	↓	1,584
AVERAGE LIST PRICE	\$1,591,705	↑	\$1,564,162
ACTIVE REO LISTINGS	78	↑	62
MONTHS SUPPLY	2.6	↑	1.95
LIST TO SALES PRICE	110%	↔	110%
MEDIAN SALES PRICE	\$1,320,000	↑	\$1,300,000
SALES CLOSED	3,167	↑	2,829
AVERAGE DAYS ON MARKET	48	↑	25

Additional Market Data: The Bay Area housing market remained strong in May 2026, driven by steady demand and continued wealth creation from the technology and AI sectors. San Francisco County was one of the region's hottest markets, with home prices rising sharply. Inventory remained tight, homes sold quickly, and multiple-offer situations were common. San Mateo County continued to be highly competitive, supported by strong employment along the Peninsula. Low inventory and sustained buyer demand kept prices elevated and days on market low. Marin County remained a desirable, supply constrained market. Demand for single-family homes stayed strong, particularly in premium communities, supporting stable price appreciation. Alameda County was more balanced, with modest inventory growth giving buyers slightly more negotiating power. Prices continued to rise, but at a slower pace than in San Francisco and San Mateo. Contra Costa County offered relatively greater affordability and a more balanced market. Demand remained healthy, especially among families seeking larger homes, while increased inventory provided buyers with more options. Overall, San Francisco and San Mateo led the region in competitiveness, while Alameda and Contra Costa offered somewhat better conditions for buyers.

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MONTHLY MARKET TRENDS MIAMI, FLORIDA (SINGLE FAMILY-DETACHED)

MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	14,679	↓	15,302
NEW LISTINGS	4,679	↓	4,842
PENDING LISTINGS	5,829	↑	5,598
AVERAGE LIST PRICE	\$1,623,165	↓	\$1,787,609
ACTIVE REO LISTINGS	392	↑	367
MONTHS SUPPLY	4.8	↓	5
LIST TO SALES PRICE	95.2%	↑	94.7%
MEDIAN SALES PRICE	\$650,000	↑	\$640,000
SALES CLOSED	3,542	↓	3,591
AVERAGE DAYS ON MARKET	39	↓	45

Additional Market Data: The Miami MSA single family market kept tightening in May. Active inventory fell to 14,679 and months of supply slipped to 4.8, edging further into seller leaning territory. New listings eased to 4,679, while total pending inventory built to 5,829, up 4% from April, even as new pendings held firm at 4,092. Closed sales of 3,542 essentially matched April's surge, consistent with Miami Dade posting its eighth straight month of year over year sales gains. Days on market dropped sharply to 39 and sellers netted 95.2% of list, both signs of stronger pricing power. Median sales price firmed to \$650,000, while average list price pulled back to \$1.62 million as new inventory skewed less luxury heavy. Rates are the watch item. The 30 year fixed has drifted back toward 6.5% on inflation and geopolitical pressure, yet buyers appear to be looking past the volatility. REO inventory ticked up to 392 but remains negligible, with no signs of distress. Net net, May delivered a leaner, faster market with firmer pricing, supported by steady absorption, cash heavy demand, and Miami's continued pull on domestic and international capital.



MONTHLY MARKET TRENDS MIAMI, FLORIDA (TOWNHOMES/CONDOS)

MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	29,188	↓	29,759
NEW LISTINGS	5,344	↓	5,713
PENDING LISTINGS	5,142	↑	5,134
AVERAGE LIST PRICE	\$674,929	↓	\$723,862
ACTIVE REO LISTINGS	522	↓	547
MONTHS SUPPLY	10.8	↓	11
LIST TO SALES PRICE	92.8%	↑	92.7%
MEDIAN SALES PRICE	\$355,000	↑	\$350,000
SALES CLOSED	3,198	↑	3,196
AVERAGE DAYS ON MARKET	60	↓	75

Additional Market Data: The Miami MSA condo and townhome market held its footing in May, though it remains deep in buyer territory. Active inventory eased to 29,188 and months of supply ticked down to 10.8, a slow grind in the right direction. New listings pulled back to 5,344 and new pendings cooled to 3,438, while pending inventory held at 5,142 and closed sales of 3,198 matched April's pace, showing steady absorption. The standout was days on market, dropping from 75 to 60, a sign that realistically priced, compliant units are clearing faster. Median sales price firmed to \$355,000 and sellers captured 92.8% of list, while average list price eased to \$674,929 as luxury weight thinned. REO slipped to 522. The bifurcation story still defines this market. Newer, well managed buildings with funded reserves are trading near normal, while older inventory struggles under SB 4-D and HB 913 compliance, special assessments commonly running \$30,000 to \$75,000 per unit in some buildings, elevated insurance, and limited financing since FHA and Fannie will not lend on non compliant buildings. Cash remains king, and building quality, not just location, drives outcomes.

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MONTHLY MARKET TRENDS ORLANDO, FLORIDA

MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	22,028	↓	22,520
NEW LISTINGS	6,910	↓	7,488
PENDING LISTINGS	3,380	↓	3,586
AVERAGE LIST PRICE	\$446,331	↑	\$430,498
ACTIVE REO LISTINGS	106	↑	89
MONTHS SUPPLY	4	↔	4
LIST TO SALES PRICE	96.9%	↑	96.6%
MEDIAN SALES PRICE	\$337,000	↑	\$336,360
SALES CLOSED	5,124	↓	5,206
AVERAGE DAYS ON MARKET	72	↓	76

Additional Market Data: The Orlando housing market in May 2026 reflects clear stabilization, with inventory holding near 22,000 homes and no longer tightening, creating balanced conditions. Sales volume has leveled off, down roughly 6% year over year, and has not experienced the typical spring surge, signaling constrained buyer activity. Home prices remain stable but are growing slowly, while days on market are rising, giving buyers more leverage. Economic drivers are moderating, with unemployment around 4.4–4.5% and slower job growth reducing upward pressure on demand. Tourism remains a core support, with Orlando International Airport handling approximately 57.7 million annual passengers, though growth has normalized, and vacation rental homes are seeing 45% to 55% vacancy rates. Overall, Orlando has shifted into a balanced, negotiation-driven market with stable supply and plateauing demand, resulting in a muted spring season. REO listings remain a very small share of the market but are up 24.7% month over month, and foreclosure filings are also rising, although distressed sales remain limited as most homeowners still have significant equity, preventing widespread foreclosures.



MONTHLY MARKET TRENDS TALLAHASSEE, FLORIDA

MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	1,061	↑	1,042
NEW LISTINGS	446	↓	473
PENDING LISTINGS	481	↑	454
AVERAGE LIST PRICE	\$389,230	↓	\$384,749
ACTIVE REO LISTINGS	29	↓	39
MONTHS SUPPLY	3.5	↔	3.5
LIST TO SALES PRICE	98%	↑	97.3%
MEDIAN SALES PRICE	\$340,750	↑	\$329,900
SALES CLOSED	340	↑	324
AVERAGE DAYS ON MARKET	61	↓	67

Additional Market Data: We are finally seeing some more sales happening and this is helping inventory and days on market. Prices are still stable and we are still selling at 98% of list price. 4% of the listings were reduced this week and that is showing a weakness in the market. REOs are not impacting prices yet as they are just 2% of inventory. 30% of the new construction homes are currently under contract and many of these have high incentives like closing costs and buying points. The REO inventory has an average days on market of 99 which is much higher than our normal market. This is mostly due to buyers wanting move in ready homes or new homes. Some cannot qualify for traditional financing options, so that is another reason many sit. Our experience is about 55% is being sold to owner occupants and the other 45% is either experienced investors/flippers or investors purchasing to fix up to rent.

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MONTHLY MARKET TRENDS TAMPA BAY, FLORIDA

MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	28,574	↓	31,500
NEW LISTINGS	5,270	↓	5,367
PENDING LISTINGS	7,850	↓	11,775
AVERAGE LIST PRICE	\$493,000	↑	\$470,900
ACTIVE REO LISTINGS	195	↓	240
MONTHS SUPPLY	6.5	↓	4.3
LIST TO SALES PRICE	95.8%	↓	96.4%
MEDIAN SALES PRICE	\$442,500	↓	\$452,500
SALES CLOSED	4,100	↓	5,000
AVERAGE DAYS ON MARKET	58	↑	55

Additional Market Data: The Tampa Bay residential real estate market continued moving toward a more balanced market in May 2026. Active inventory remained elevated at nearly 28,574 homes for sale, giving buyers significantly more options than in recent years. New listings continued to outpace pending sales, increasing available supply and creating a more competitive environment for sellers. Buyer demand remained steady, with approximately 4,100 closed sales during the month. The median sale price held near \$442,500, reflecting continued price stability across the region. Sellers received an average of 95% to 96% of their original list price, indicating greater buyer negotiating power than in recent years' strong seller's market. Homes averaged about 60 days on market before selling—slower than previous years but still consistent with a healthy market. With six to seven months of supply, the market is nearing equilibrium between buyers and sellers. Overall, the Tampa Bay housing market remains stable, supported by strong employment, population growth, and Florida's continued appeal to retirees and relocating households. Buyers are benefiting from increased inventory and negotiating opportunities, while competitively priced homes continue to sell successfully.



MONTHLY MARKET TRENDS ATLANTA METRO, GEORGIA

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MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	13,349	↓	13,721
NEW LISTINGS	8,707	↓	9,014
PENDING LISTINGS	4,642	↓	4,907
AVERAGE LIST PRICE	\$594,068	↑	\$561,273
ACTIVE REO LISTINGS	0	↓	22
MONTHS SUPPLY	4.1	↑	3.5
LIST TO SALES PRICE	98.7%	↑	98.3%
MEDIAN SALES PRICE	\$470,000	↑	\$444,995
SALES CLOSED	5,170	↓	17,905
AVERAGE DAYS ON MARKET	34	↓	46

Additional Market Data: The Atlanta, Georgia housing market continues to transition toward more balanced conditions as inventory levels increase and buyer activity remains moderated by elevated mortgage rates.



MONTHLY MARKET TRENDS CHICAGO, ILLINOIS

MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	13,345	↑	12,424
NEW LISTINGS	13,207	↓	13,230
PENDING LISTINGS	2,387	↓	2,393
AVERAGE LIST PRICE	\$580,789	↓	\$584,383
ACTIVE REO LISTINGS	142	↔	142
MONTHS SUPPLY	1.53	↓	1.56
LIST TO SALES PRICE	101.17%	↑	100.68%
MEDIAN SALES PRICE	\$394,900	↑	\$390,000
SALES CLOSED	8,729	↑	7,968
AVERAGE DAYS ON MARKET	23	↓	26

Additional Market Data: The May 2026 housing market remained competitive, with retail properties continuing to post strong gains despite limited inventory. Median and average sales prices reached two-year highs, while homes sold quickly and sellers received just over asking price on average. Inventory, new listings, and months supply of inventory all declined, reinforcing seller-favorable conditions. Although sales activity increased from April, the market remains constrained by a shortage of available homes.

The REO market showed mixed results. Median and average sales prices improved month-over-month but remained below May 2025 levels. Closed sales, inventory, and new listings fell sharply, reaching their lowest levels of the past two years. REO properties sold faster than in April but continued to spend more time on the market than a year ago. Overall, limited inventory is affecting both markets, though retail properties continue to demonstrate stronger price growth and demand than bank-owned properties.

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MONTHLY MARKET TRENDS BALTIMORE, MARYLAND

USREO
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MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	5,019	↑	4,720
NEW LISTINGS	3,668	↑	3,654
PENDING LISTINGS	1,859	↑	1,845
AVERAGE LIST PRICE	\$681,515	↑	\$670,599
ACTIVE REO LISTINGS	52	↑	38
MONTHS SUPPLY	2.5	↓	2.6
LIST TO SALES PRICE	99%	↑	98.7%
MEDIAN SALES PRICE	\$475,000	↑	\$445,000
SALES CLOSED	2,253	↑	2,147
AVERAGE DAYS ON MARKET	23	↓	29

Additional Market Data: The Baltimore MSA housing market remains stable with modest appreciation and continued buyer demand. Inventory levels have increased compared to recent years, providing buyers with more options and reducing some of the urgency seen during the peak seller's market. Homes are taking longer to sell than they did a year ago, and buyers are demonstrating greater price sensitivity, making strategic pricing increasingly important. Despite these changes, well-maintained and appropriately priced homes continue to attract multiple offers and sell near asking price.

Several factors are influencing current market conditions, including elevated mortgage interest rates, affordability concerns, increased housing inventory, and broader economic uncertainty. At the same time, the Baltimore region continues to benefit from a diverse employment base, relatively affordable housing compared to nearby Washington-area markets, ongoing redevelopment efforts, and sustained demand from both owner-occupants and investors. These factors have helped support home values and maintain market stability throughout the region.

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MONTHLY MARKET TRENDS SO. MARYLAND, MARYLAND

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MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	6,025	↑	5,618
NEW LISTINGS	3,337	↓	3,566
PENDING LISTINGS	1,359	↓	1,403
AVERAGE LIST PRICE	\$660,152	↑	\$654,533
ACTIVE REO LISTINGS	94	↑	78
MONTHS SUPPLY	3.4	↔	3.4
LIST TO SALES PRICE	100%	↑	97.5%
MEDIAN SALES PRICE	\$520,000	↑	\$512,750
SALES CLOSED	1,913	↑	1,890
AVERAGE DAYS ON MARKET	31	↓	36

Additional Market Data: The Southern Maryland market, including Prince George's, Montgomery, Charles, and Calvert Counties, remains relatively stable with continued buyer demand supporting home values. While inventory levels have improved compared to prior years, the supply of available homes remains limited in many price ranges, particularly for well-maintained and move-in-ready properties. Homes that are appropriately priced continue to attract strong interest and are often selling near or at asking price, although marketing times have increased slightly as buyers become more selective.

Market conditions are being influenced by elevated mortgage interest rates, affordability concerns, increased inventory, and ongoing economic uncertainty. Additionally, employment trends within the federal government and related industries continue to impact buyer confidence throughout the region. Despite these challenges, the area's strong employment base, desirable suburban communities, access to transportation corridors, and proximity to Washington, D.C. continue to support housing demand and overall market stability. As a result, the market is best characterized as stable, with modest softening in some segments due to increased buyer negotiating power and greater housing choices.

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MONTHLY MARKET TRENDS MINNEAPOLIS, MINNESOTA

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MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	30,287	↑	28,282
NEW LISTINGS	7,126	↓	7,150
PENDING LISTINGS	n/a		n/a
AVERAGE LIST PRICE	\$538,005	↑	\$524,081
ACTIVE REO LISTINGS	n/a		n/a
MONTHS SUPPLY	2	↓	3
LIST TO SALES PRICE	99.4%	↓	100.4%
MEDIAN SALES PRICE	\$400,000	↑	\$394,000
SALES CLOSED	4,519	↑	3,609
AVERAGE DAYS ON MARKET	30	↓	36

Additional Market Data: Inventory & Supply: Active listings have seen a recovery, with the metro area maintaining between 2 and 2.8 months of supply. While still technically a seller's market, this is a significant improvement from the record lows of the early 2020s, offering buyers more selection in neighborhoods like St. Michael and Rosemount. Pricing: The median sales price in the metro area has stabilized around \$400,000. Year-over-year appreciation has slowed to a sustainable 1% to 2.6%, effectively ending the era of volatile price spikes. Market Pace: Homes are spending an average of 45 to 62 days on the market. This slower pace has largely eliminated "take it or leave it" cultures, with roughly 23% of active listings seeing price adjustments.



MONTHLY MARKET TRENDS ST. LOUIS, MISSOURI

MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	5,537	↑	5,491
NEW LISTINGS	2,708	↑	1,684
PENDING LISTINGS	3,274	↑	2,889
AVERAGE LIST PRICE	\$382,436	↓	\$399,261
ACTIVE REO LISTINGS	120	↑	79
MONTHS SUPPLY	2.21	↓	2.34
LIST TO SALES PRICE	100.9%	↑	99.21%
MEDIAN SALES PRICE	\$322,500	↑	\$305,000
SALES CLOSED	2,496	↑	2,345
AVERAGE DAYS ON MARKET	34	↓	35

Additional Market Data: The month finished strong with almost all categories increasing with a couple of exceptions. Average list price dropped slightly over concern that buyers interest was slowing. While the numbers show a relatively stable market, the impression on the street from the agents is that there are less buyers and less homes in multiple offers. Homes are still selling and selling with strong numbers, but there are not as many buyers hitting the street so there is an underlying nervousness if you represent a seller. Initial pricing seems to be at a slight decrease to guarantee interest. If you represent a buyer, there is more confidence they will be able to find exactly what they are looking for at possibly a slightly lower price with less competition.

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MONTHLY MARKET TRENDS NEWARK, NEW JERSEY

MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	6,102	↑	5,625
NEW LISTINGS	2,802	↑	2,529
PENDING LISTINGS	3,985	↑	3,703
AVERAGE LIST PRICE	\$725,000	↑	\$708,900
ACTIVE REO LISTINGS	59	↑	48
MONTHS SUPPLY	2.61	↓	2.87
LIST TO SALES PRICE	101.75%	↑	101.3%
MEDIAN SALES PRICE	\$624,000	↑	\$610,580
SALES CLOSED	2,711	↑	2,309
AVERAGE DAYS ON MARKET	35	↓	41

Additional Market Data: May 2026 reflected a stronger spring market across all six counties, with new listings, pending activity, and closed sales increasing from April. Inventory expanded, but buyer demand continued to absorb much of the new supply, keeping months supply near 2.6 months and preserving a seller-leaning environment. Essex, Union, Morris, and Somerset remained especially competitive, with well-priced homes continuing to sell above list and days on market staying compressed. Somerset showed the tightest supply conditions, while Sussex and parts of Hunterdon moved at a more measured pace with longer marketing times and slightly more negotiation. Overall, the May data suggests that inventory is improving, but not enough to fully rebalance the market. Pricing remains firm, buyer urgency is still present, and the next key signal will be whether June listing growth continues or begins to flatten.

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MONTHLY MARKET TRENDS CATSKILLS REGION, NEW YORK

MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	629	↑	521
NEW LISTINGS	233	↑	227
PENDING LISTINGS	69	↓	139
AVERAGE LIST PRICE	\$434,000	↓	\$439,000
ACTIVE REO LISTINGS	2	↓	8
MONTHS SUPPLY	8.74	↑	7.14
LIST TO SALES PRICE	91.8%	↓	93.4%
MEDIAN SALES PRICE	\$306,000	↓	\$322,500
SALES CLOSED	48	↓	54
AVERAGE DAYS ON MARKET	120	↑	111

Additional Market Data: Sullivan County continued to present a much softer and more buyer-favorable market than the core Hudson Valley counties. Active inventory reached 629 listings in May, with 233 new listings and only 69 new pending listings, producing 8.74 months of supply. The median list price was \$434,000, while the median sales price was \$306,000, reflecting a noticeable gap between asking prices and closed-sale pricing. The list-to-sale ratio was 91.8%, and median days on market reached 120, both pointing to longer marketing times and greater buyer leverage. Closed sales totaled 48 for the month. REO inventory remained minimal, with only 2 REO listings reported, so distressed inventory is not currently a major driver of overall market conditions in Sullivan County.

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MONTHLY MARKET TRENDS HUDSON VALLEY REGION, NEW YORK

MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	4,491	↑	4,011
NEW LISTINGS	2,555	↑	1,986
PENDING LISTINGS	1,649	↓	2,478
AVERAGE LIST PRICE	\$736,842	↑	\$723,000
ACTIVE REO LISTINGS	22	↓	73
MONTHS SUPPLY	3.92	↑	3.5
LIST TO SALES PRICE	102.5%	↑	100.2%
MEDIAN SALES PRICE	\$794,908	↑	\$607,000
SALES CLOSED	902	↑	838
AVERAGE DAYS ON MARKET	37	↓	50

Additional Market Data: The May Hudson Valley market remained active, with 4,491 active listings, 2,555 new listings, and 1,649 new pending listings across the seven-county region. Inventory increased meaningfully in several counties, but overall supply remained moderate at a weighted 3.92 months, still generally favoring sellers in the lower-supply counties. Westchester continued to show the strongest pricing and buyer competition, with a \$1,200,000 median sales price, 2.47 months of supply, and a 107.6% list-to-sale ratio. Putnam and Rockland also remained tight, both producing list-to-sale ratios above 100%. Orange, Ulster, and Columbia showed more balanced conditions, with Columbia carrying the highest months supply in the region at 5.55. The regional weighted median sales price was approximately \$794,908, heavily influenced by Westchester's sales volume and pricing. REO inventory remained limited, with only 22 reported REO listings across the Hudson Valley, led by Westchester with 8 and Orange with 5.

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MONTHLY MARKET TRENDS NEW YORK, NEW YORK – NASSAU

MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	2,681	↑	2,516
NEW LISTINGS	1,395	↓	1,526
PENDING LISTINGS	1,112	↑	939
AVERAGE LIST PRICE	\$1,103,442	↑	\$1,045,060
ACTIVE REO LISTINGS	50	↑	48
MONTHS SUPPLY	3.2	↑	3.1
LIST TO SALES PRICE	100.1%	↓	100.3%
MEDIAN SALES PRICE	\$850,000	↑	\$828,750
SALES CLOSED	699	↑	590
AVERAGE DAYS ON MARKET	52	↑	51

Additional Market Data: As of May 2026, the housing market remained relatively strong across Queens County, Nassau County, and Suffolk County, with home prices continuing to show resilience despite elevated mortgage interest rates. Limited housing inventory and steady buyer demand has helped support property values throughout the region, although market activity has become more balanced compared to the highly competitive conditions seen in recent years. Buyers generally have slightly more options available than they did a year ago, but affordability challenges continue to impact purchasing decisions. Overall, the market continues to favor sellers, though conditions are gradually normalizing as inventory levels increase and homes spend more time on the market before selling. Nassau and Suffolk Counties remain among the most competitive suburban markets in the New York metropolitan area, while Queens continues to attract buyers seeking relatively affordable alternatives within New York City. Looking ahead, moderate price appreciation and stable demand are expected to continue, provided economic conditions and mortgage rates remain relatively consistent.

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MONTHLY MARKET TRENDS NEW YORK, NEW YORK – SUFFOLK



MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	3,477	↑	3,136
NEW LISTINGS	1,798	↓	1,845
PENDING LISTINGS	1,371	↑	1,271
AVERAGE LIST PRICE	\$890,179	↑	\$868,604
ACTIVE REO LISTINGS	74	↑	62
MONTHS SUPPLY	3.1	↑	2.8
LIST TO SALES PRICE	102.1%	↑	100.8%
MEDIAN SALES PRICE	\$680,000	↔	\$680,000
SALES CLOSED	935	↑	803
AVERAGE DAYS ON MARKET	48	↓	60

Additional Market Data: Additional Market Data: As of May 2026, the housing market remained relatively strong across Queens County, Nassau County, and Suffolk County, with home prices continuing to show resilience despite elevated mortgage interest rates. Limited housing inventory and steady buyer demand has helped support property values throughout the region, although market activity has become more balanced compared to the highly competitive conditions seen in recent years. Buyers generally have slightly more options available than they did a year ago, but affordability challenges continue to impact purchasing decisions. Overall, the market continues to favor sellers, though conditions are gradually normalizing as inventory levels increase and homes spend more time on the market before selling. Nassau and Suffolk Counties remain among the most competitive suburban markets in the New York metropolitan area, while Queens continues to attract buyers seeking relatively affordable alternatives within New York City. Looking ahead, moderate price appreciation and stable demand are expected to continue, provided economic conditions and mortgage rates remain relatively consistent.

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MONTHLY MARKET TRENDS NEW YORK, NEW YORK – QUEENS

MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	3,707	↑	3,636
NEW LISTINGS	1,100	↓	1,225
PENDING LISTINGS	700	↑	685
AVERAGE LIST PRICE	\$678,110	↓	\$686,351
ACTIVE REO LISTINGS	59	↑	57
MONTHS SUPPLY	6.4	↑	6.3
LIST TO SALES PRICE	97.6%	↓	97.7%
MEDIAN SALES PRICE	\$620,000	↓	\$672,500
SALES CLOSED	422	↓	491
AVERAGE DAYS ON MARKET	82	↑	80

Additional Market Data: Additional Market Data: As of May 2026, the housing market remained relatively strong across Queens County, Nassau County, and Suffolk County, with home prices continuing to show resilience despite elevated mortgage interest rates. Limited housing inventory and steady buyer demand has helped support property values throughout the region, although market activity has become more balanced compared to the highly competitive conditions seen in recent years. Buyers generally have slightly more options available than they did a year ago, but affordability challenges continue to impact purchasing decisions. Overall, the market continues to favor sellers, though conditions are gradually normalizing as inventory levels increase and homes spend more time on the market before selling. Nassau and Suffolk Counties remain among the most competitive suburban markets in the New York metropolitan area, while Queens continues to attract buyers seeking relatively affordable alternatives within New York City. Looking ahead, moderate price appreciation and stable demand are expected to continue, provided economic conditions and mortgage rates remain relatively consistent.

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MONTHLY MARKET TRENDS LAS VEGAS, NEVADA

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MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	9,442	↓	9,851
NEW LISTINGS	1,894	↓	1,931
PENDING LISTINGS	1,204	↑	1,187
AVERAGE LIST PRICE	\$575,000	↓	\$580,000
ACTIVE REO LISTINGS	89	↑	86
MONTHS SUPPLY	3	↓	4
LIST TO SALES PRICE	96%	↔	96%
MEDIAN SALES PRICE	\$490,000	↑	\$473,875
SALES CLOSED	650	↑	613
AVERAGE DAYS ON MARKET	52	↓	56

Additional Market Data: The Las Vegas housing market reached a new milestone in May, with the median sales price climbing to a record high despite a decline in overall sales volume. Median home prices increased 2.1% compared to the same time last year. At the same time, inventory levels and days on market remain elevated, providing buyers with more choices and greater negotiating power. The condo and townhouse market has seen a shift, with median prices declining 3.9% valley wide. Overall, the market is continuing to move toward a more balanced environment, creating favorable conditions for buyers while home values remain resilient.



MONTHLY MARKET TRENDS PHILADELPHIA, PENNSYLVANIA

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MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	10,758	↑	10,376
NEW LISTINGS	6,132	↑	6,086
PENDING LISTINGS	2,483	↓	2,634
AVERAGE LIST PRICE	\$477,690	↑	\$474,000
ACTIVE REO LISTINGS	178	↓	353
MONTHS SUPPLY	2.8	↓	3.2
LIST TO SALES PRICE	95%	↑	93%
MEDIAN SALES PRICE	\$450,677	↑	\$441,000
SALES CLOSED	3,535	↑	3,195
AVERAGE DAYS ON MARKET	27	↓	30

Additional Market Data: Continued spring reactivation in buyer engagement has extended the recovery trajectory established since the prior dip and positioning the market in a stronger month-to-month recovery phase. The Philadelphia metro has not yet fully aligned with last May's demand level, with affordability constraints and financing sensitivity continuing to moderate the pace of recovery even as seasonal patterns provide meaningful near-term support. Demand by home type in Philadelphia shows a mixed but generally improving picture this period. Entry-level single-family homes held steady, unchanged month-over-month reflecting continued affordability constraints. Mid-range single-family homes improved but remain slightly below a year ago, while higher-end single-family homes are still below a year ago, signaling a strong rebound from last month's low base. Entry-level condos remained stable unchanged month-over-month and slightly below a year ago, continuing to represent the strongest demand segment. Townhomes and twin homes are down slightly from last month and below a year ago, indicating mild softening in attached housing demand while remaining relatively balanced overall.

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MONTHLY MARKET TRENDS SOUTH CENTRAL, PENNSYLVANIA

MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	1,769	↑	1,326
NEW LISTINGS	2,140	↓	2,235
PENDING LISTINGS	2,028	↓	2,101
AVERAGE LIST PRICE	\$349,425	↓	\$352,231
ACTIVE REO LISTINGS	24	↑	19
MONTHS SUPPLY	2.38	↑	2.21
LIST TO SALES PRICE	107.6%	↑	100.5%
MEDIAN SALES PRICE	\$310,000	↑	\$300,000
SALES CLOSED	1,968	↑	1,683
AVERAGE DAYS ON MARKET	22	↓	24

Additional Market Data: The new inventory that hit the market in May was quickly absorbed with largest amount of sold properties since August 2025. Prices are up 5% year over year with days on market continuing to decrease. It is still a strong seller's market for homes that are in good condition and priced correctly. Even distressed homes, which are rare, saw an uptick in price and decrease in days on market. Data reflects the markets in York, Harrisburg, Lancaster, and Reading, Pennsylvania.



MONTHLY MARKET TRENDS DALLAS/FT WORTH, TEXAS

MAY 2026

CATEGORIES	Apr 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	59,730	↑	58,387
NEW LISTINGS	22,908	↓	23,210
PENDING LISTINGS	8,748	↓	9,229
AVERAGE LIST PRICE	\$466,092	↓	\$503,759
ACTIVE REO LISTINGS	334	↓	339
MONTHS SUPPLY	4	↔	4
LIST TO SALES PRICE	100%	↔	100%
MEDIAN SALES PRICE	\$323,500	↑	\$319,900
SALES CLOSED	14,501	↑	13,677
AVERAGE DAYS ON MARKET	70	↓	75

Additional Market Data: DFW continued its transition toward a more balanced housing market in May. Active listings increased while new listings and pending sales both declined, signaling that inventory growth is continuing to outpace buyer demand. Despite a significant decline in average list price from \$503,759 to \$466,092, the median sales price increased slightly, indicating that well-priced homes continue to attract buyers. Closed sales rose and average days on market improved, suggesting that motivated buyers remain active even as affordability challenges persist. The market's 4-month supply of inventory remained unchanged, reflecting conditions that are increasingly favorable to buyers compared to the highly competitive markets of the past several years. Elevated mortgage rates, higher insurance costs, and growing inventory continue to place pressure on sellers, resulting in more price adjustments and greater negotiation opportunities for buyers.

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MONTHLY MARKET TRENDS HOUSTON, TEXAS

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MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	75,935	↓	76,024
NEW LISTINGS	29,775	↔	29,775
PENDING LISTINGS	7,232	↓	7,994
AVERAGE LIST PRICE	\$375,557	↓	\$390,957
ACTIVE REO LISTINGS	463	↑	454
MONTHS SUPPLY	5	↓	5.4
LIST TO SALES PRICE	100%	↔	100%
MEDIAN SALES PRICE	\$210,000	↓	\$223,000
SALES CLOSED	15,208	↑	14,084
AVERAGE DAYS ON MARKET	78	↓	88

Additional Market Data: Houston's market continued shifting toward buyers in May. Single-family sales reached 7,834 homes, down 7% from 8,419 a year ago, with total dollar volume slipping 5% to \$3.57 billion. Pricing eased rather than crashed, as the median sale price fell 2% to \$335,000 while the average rose 2% to \$455,573 — a sign the upper end keeps moving while mid-priced homes face more pressure. Inventory was the real headline: single-family supply hit 5.7 months, a 36% jump year over year, with homes sitting longer, giving buyers more options, time, and negotiating room. The townhome and condo segment held its value, with median price rising 3% to \$230,000 even as sales cooled, while rentals stayed competitive as leases climbed 7% to 6,303 and median rent dipped 2% to \$2,100. Bottom line: rising supply, patient demand, and softening prices make this a healthy correction rather than a collapse — and a genuine buyer's market.

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MONTHLY MARKET TRENDS SEATTLE/TACOMA, WASHINGTON

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MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	9,139	↑	8,110
NEW LISTINGS	4,072	↑	3,119
PENDING LISTINGS	2,419	↓	3,381
AVERAGE LIST PRICE	\$1,215,367	↑	\$1,037,226
REO LISTINGS	21	↓	49
MONTHS SUPPLY	1.31	↓	2.65
LIST TO SALES PRICE	99.8%	↔	99.8%
MEDIAN SALES PRICE	\$794,232	↓	\$797,500
SALES CLOSED	3,117	↑	3,050
AVERAGE DAYS ON MARKET	31	↓	33

Additional Market Data: The Puget Sound housing market is sending a strong message right now. Inventory has tightened and new listings have slowed, reducing the number of homes available for buyers. While both pending sales and closed sales have also declined, indicating that buyers are becoming more cautious rather than more active. The primary driver appears to be economic uncertainty. Consumers are facing mixed messages about inflation, interest rates, employment, and global stability. The ongoing conflict involving Iran has added another layer of concern, particularly around energy prices, global trade, and the risk of a broader economic slowdown. Economic analysts continue to warn that disruptions in the Middle East could impact oil markets and increase recession concerns, which tends to make consumers postpone major financial decisions such as purchasing a home. What we're seeing is not a lack of demand, but a lack of confidence. Buyers are still looking, showings remain active, and many households still need to move. However, some are choosing to wait for greater clarity before making a commitment. As a result, fewer homes are going under contract and fewer transactions are making it to the closing table. In short, the market isn't weakening as much as it is pausing. Inventory is lower, demand still exists, but economic uncertainty is causing many buyers to sit on the sidelines until they feel more confident about the future. When that confidence returns, much of today's pent-up demand could re-enter the market quickly.

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MONTHLY MARKET TRENDS WASHINGTON, DC

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MAY 2026

CATEGORIES	May 2026	Increase/Decrease	Prior Month
ACTIVE LISTINGS	3,239	↑	3,162
NEW LISTINGS	1,287	↓	1,482
PENDING LISTINGS	431	↑	223
AVERAGE LIST PRICE	\$831,174	↓	\$854, 917
ACTIVE REO LISTINGS	63	↓	65
MONTHS SUPPLY	6.3	↑	6
LIST TO SALES PRICE	99%	↑	98%
MEDIAN SALES PRICE	\$749,000	↑	\$661,500
SALES CLOSED	547	↓	586
AVERAGE DAYS ON MARKET	44	↓	50

Additional Market Data: The Washington, D.C. housing market is showing signs of moderation compared to the highly competitive conditions of recent years. Inventory levels have increased, giving buyers more choices and reducing the intensity of multiple-offer situations. Homes are generally taking longer to sell, and sellers are finding it necessary to price strategically and be more responsive to market conditions. While well-presented and properly priced properties continue to attract strong interest, overall price growth has softened.

Several factors are influencing current market conditions, including elevated mortgage rates, affordability challenges, increased housing inventory, and economic uncertainty tied to changes in federal employment and government-related sectors. These factors have caused some buyers to delay purchasing decisions while encouraging more homeowners to list their properties, resulting in a more balanced market environment than experienced over the past several years.

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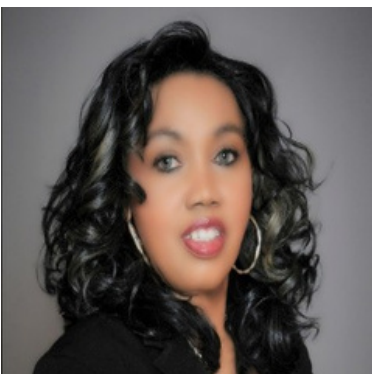
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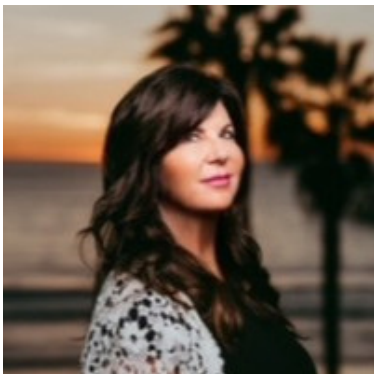
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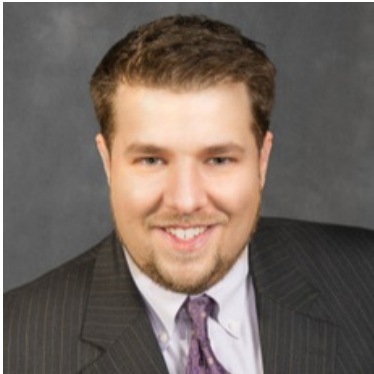
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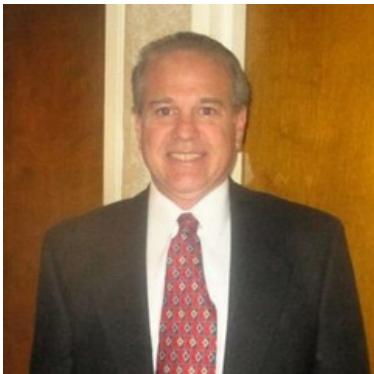
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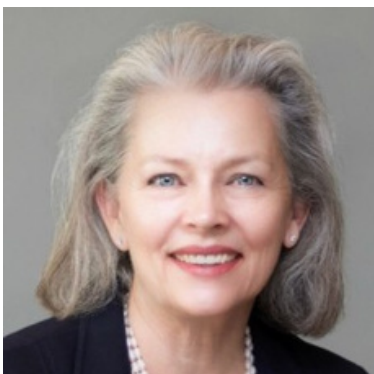
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