



Market Trends *Report*



September 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>Deltona-Daytona- Ormond, FL</u>	Flagler, Volusia	David Petkovsek
<u>Miami, FL</u> (Single Family-Detached)	Broward, Miami-Dade, Palm Beach (Single Family-Detached)	Eddie Blanco
Miami, FL (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

MARKET AREAS

AREA	COUNTIES INCLUDED	PROVIDED BY
<u>Tampa Bay, FL</u>	Hernando, Hillsborough, Pasco, Pinellas	Peter Chicouris
Metro Atlanta, GA	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>Las Vegas, NV</u>	Clark	Brandy White Elk
<u>Newark, NJ</u>	Essex, Hunterdon, Morris, Somerset, Sussex, Union	Nick Verdi

MARKET AREAS

AREA	COUNTIES INCLUDED	PROVIDED BY
<u>Catskills Region, NY</u>	Sullivan	Lee A. Raphael
<u>Hudson Valley, NY</u>	Dutchess, Ulster, Orange, Putnam, Rockland, Westchester, Columbia	Lee A. Raphael
<u>New York, NY</u>	<u>Naussau, Suffolk, Queens</u> (presented in separate charts)	Todd Yovino
<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>Washington, DC</u>	District of Columbia	Melanie Gamble



MONTHLY MARKET TRENDS PHOENIX, ARIZONA

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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	21,900	↑	20,097
NEW LISTINGS	8,409	↑	7,277
PENDING LISTINGS	5,376	↓	6,146
AVERAGE LIST PRICE	\$588,545	↑	\$583,108
REO LISTINGS	190	↑	156
MONTHS SUPPLY	4.33	↑	4.08
LIST TO SALES PRICE	94.74%	↓	96.77%
MEDIAN SALES PRICE	\$475,000	↑	\$449,998
SALES CLOSED	7,336	↑	4,922
AVERAGE DAYS ON MARKET	86	↓	87

Additional Market Data: The real estate market in Maricopa and Pinal Counties continues to show signs of slowing, with inventory increasing and buyers having more options. Active listings increased 8.94% from last month to 21,900, while pending sales declined 10.61%, indicating softer buyer demand. Closed sales increased slightly by 1.42% but remain 8.09% below last year. Months of supply increased to 4.33, giving buyers more negotiating power. The median sales price remained relatively stable at \$450,000, while average days on market decreased slightly to 85 days. We are seeing buyers become more selective, often requesting seller concessions, repairs, and price reductions. Homes that are priced competitively and in move-in-ready condition continue to attract the most interest. Higher financing costs, affordability concerns, and competition from new construction incentives are influencing buyer decisions, especially in developing areas of Pinal County. We expect pricing and property condition to remain key factors in achieving a successful sale.

Information provided for this market by **Ramiro Gonzalez** at **Prestige Realty**.

Cell Phone: 480-593-8438 | Email: Rogsellsaz@gmail.com



MONTHLY MARKET TRENDS ORANGE COUNTY, CALIFORNIA

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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	4,608	↓	4,984
NEW LISTINGS	1,414	↓	2,706
PENDING LISTINGS	732	↓	1,901
AVERAGE LIST PRICE	\$1,290,000	↓	\$2,404,987
REO LISTINGS	1	↓	3
MONTHS SUPPLY	3	↑	2.9
LIST TO SALES PRICE	99%	↔	99%
MEDIAN SALES PRICE	\$1,225,000	↓	\$1,275,000
SALES CLOSED	1,610	↓	1,800
AVERAGE DAYS ON MARKET	47	↑	45.5

Additional Market Data: Overall prediction headed into late 2026 and early 2027, is a transition into “predictable stability”. With a seasonal slowdown, leveling prices and historic low transaction volumes. Most homeowners enjoying a 4% or lower interest rates, are staying put. Experts predict 1%-3.9% growth, in 2027.



MONTHLY MARKET TRENDS LOS ANGELES, CALIFORNIA

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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	56,406	↑	53,255
NEW LISTINGS	6,193	↑	6,014
PENDING LISTINGS	1,283	↓	1,415
AVERAGE LIST PRICE	\$1,806,643	↑	\$1,599,090
ACTIVE REO LISTINGS	13	↓	17
MONTHS SUPPLY	14	↔	14
LIST TO SALES PRICE	75%	↓	84%
MEDIAN SALES PRICE	\$915,000	↓	\$925,000
SALES CLOSED	3,711	↓	3,736
AVERAGE DAYS ON MARKET	47	↑	45

Additional Market Data: September reflected a relatively stable Los Angeles County housing market, with steady inventory, softer buyer activity, and greater pricing sensitivity as the market transitioned into fall. Active listings rose slightly from 53,255 to 56,406, while new listings increased from 6,014 to 6,193, indicating continued seller participation. Months of supply remained at 14, providing buyers with ample options. Pending sales declined from 1,415 to 1,283, and closed sales dipped from 3,739 to 3,711, reflecting a more measured pace as the summer selling season ended. Pricing showed signs of softening. The median sales price fell from \$925,000 to \$915,000, while the average list price rose to \$1,806,643, reflecting a shift toward higher-priced available inventory. The sale-to-list price ratio fell from 84% to 75%, suggesting more negotiating room for buyers and greater pressure on sellers to price competitively. Average days on market increased from 45 to 47. REO listings declined from 17 to 13, remaining a very small share of the overall market. Overall, September pointed to a slower fall market, with stable inventory, modestly declining sales activity, and increased buyer leverage. Well-priced, properly marketed homes still had opportunities to attract buyers, while sellers faced greater competition and needed realistic pricing strategies to secure successful transactions.

Information provided for this market by **Jeff Russell** at **Russell Realty Group**.

Cell Phone: (949) 200-7055 | Email: rrg@russellrealtygrp.com



MONTHLY MARKET TRENDS

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RIVERSIDE/SAN BERNARDINO, CALIFORNIA

SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	16,594	↑	16,512
NEW LISTINGS	771	↑	690
PENDING LISTINGS	5,409	↓	5,864
AVERAGE LIST PRICE	\$755,894	↑	\$750,964
ACTIVE REO LISTINGS	263	↑	201
MONTHS SUPPLY	4	↔	4
LIST TO SALES PRICE	96%	↔	96%
MEDIAN SALES PRICE	\$645,370	↑	\$631,922
SALES CLOSED	3,774	↓	4,032
AVERAGE DAYS ON MARKET	61	↓	64

Additional Market Data: The September 2026 housing market across Riverside and San Bernardino counties remained relatively balanced as the summer selling season transitioned into fall. Inventory levels were generally stable, while new listings showed modest movement and buyer activity continued at a measured pace. Pricing remained resilient, although both counties showed signs of increased buyer selectivity and greater sensitivity to affordability. Market times held in the low-to-mid 60-day range, suggesting homes that are priced appropriately are still attracting interest, while overpriced properties may require additional exposure or price adjustments. Pending activity softened somewhat, reflecting continued caution among buyers facing higher borrowing costs and economic uncertainty. Overall, the Inland Empire market remains stable rather than distressed, with sellers needing realistic pricing strategies and buyers benefiting from improved selection and stronger negotiating opportunities as the market moves into the final quarter of 2026.



MONTHLY MARKET TRENDS SAN DIEGO, CALIFORNIA

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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	6,004	↓	6,007
NEW LISTINGS	1,496	↓	1,512
PENDING LISTINGS	1,263	↓	1,403
AVERAGE LIST PRICE	\$1,669,839	↑	\$1,542,313
ACTIVE REO LISTINGS	16	↓	17
MONTHS SUPPLY	4	↔	4
LIST TO SALES PRICE	97%	↑	96%
MEDIAN SALES PRICE	\$1,074,500	↓	\$1,105,250
SALES CLOSED	1,206	↓	1,302
AVERAGE DAYS ON MARKET	30	↑	28

Additional Market Data: There were a several dramatic moves by the market indicators in September. The Average Listing Price jumped 8% month over month, to \$1,669,839, as more high-end homeowners listed homes for sale. The other indicator was the number of Homes Sold, which hit an 8 month low and was down more than 9% month over month. Pending Sales also saw a 9% drop month over month. The spike in interest rates likely contributed to the recent declines, as potential Home Buyers saw their potential monthly payment rise to unaffordable levels.

A recent reporting challenge, is the data for List to Sales Price, which relies on Real Estate Agents to properly report Concessions and Buyer's Agent Commissions. The List to Sales Price and Closing Prices, are likely softer than the numbers indicate.

The Takeaway - Buyer demand is slowing down, as elevated interest rates are strangling household budgets. Be careful using backward looking data when setting list prices.

Information provided for this market by **Joe Gummerson** at **Joseph Gummerson, Broker**.
Cell Phone: 619-347-7027 | Email: joegummerson@gmail.com



MONTHLY MARKET TRENDS SACRAMENTO, CALIFORNIA

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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	*Prior Month
ACTIVE LISTINGS	5,214	↑	5,183
NEW LISTINGS	1,574	↓	1,622
PENDING LISTINGS	1,618	↓	1,880
AVERAGE LIST PRICE	\$730,700	↑	\$638,000
ACTIVE REO LISTINGS	225	↓	260
MONTHS SUPPLY	3	↓	2.5
LIST TO SALES PRICE	99%	↔	99%
MEDIAN SALES PRICE	\$667,600	↑	\$627,000
SALES CLOSED	1,745	↓	2,005
AVERAGE DAYS ON MARKET	43	↑	35

Additional Market Data: The four-county area (El Dorado, Placer, Sacramento and Yolo) is balanced to slightly seller-favorable, with conditions varying by county. Median sales prices are approximately \$740,000 in El Dorado, \$685,000 in Placer and Yolo, and \$560,000 in Sacramento. Sacramento County has the tightest supply at about 2.4 months, while Placer, Yolo and especially El Dorado carry higher inventory, giving buyers more negotiating room there. Homes are selling at roughly 98-99% of list price, with Sacramento County marketing times around 38 days. Factors influencing the data include mortgage rates in the mid-6% range limiting affordability, low new-listing volume, and steady demand from buyers seeking value in the more affordable Sacramento market. Updated, move-in ready homes sell fastest, while dated homes or those with open repairs take longer and require price flexibility.

**September vs. July Data Comparison*

Information provided for this market by **Serina Lowden** at **All City Homes**.

Cell Phone: 209-304-5841 | Email: serina@serinalowden.com



MONTHLY MARKET TRENDS SAN FRANCISCO, CALIFORNIA

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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	5,761	↑	5,433
NEW LISTINGS	3,175	↑	2,757
PENDING LISTINGS	1,090	↑	969
AVERAGE LIST PRICE	\$1,493,636	↑	\$1,325,616
ACTIVE REO LISTINGS	27	↑	26
MONTHS SUPPLY	2.2	↔	2.2
LIST TO SALES PRICE	114.41%	↑	108.88%
MEDIAN SALES PRICE	\$1,098,000	↓	\$1,150,000
SALES CLOSED	2,586	↑	2,461
AVERAGE DAYS ON MARKET	30	↓	32

Additional Market Data: The Bay Area housing market remained resilient in September 2026, but conditions varied considerably by location, property type, price range, and condition. Well-priced, move-in-ready single-family homes continued to attract strong buyer interest, while overpriced properties, homes requiring substantial repairs, and certain condominium segments faced greater pricing pressure. The market also demonstrated its typical seasonal transition from summer into fall. However, September was not uniformly slow. Limited housing inventory continued to support values in many desirable neighborhoods, even as affordability constraints made buyers increasingly selective. High-income demand, including buyers associated with the technology and AI industries, continued to support portions of San Francisco's upper-end housing market.



MONTHLY MARKET TRENDS DELTONA-DAYTONA-ORMOND, FLORIDA

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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	4,821	↑	4,459
NEW LISTINGS	1,270	↑	910
PENDING LISTINGS	1,127	↑	683
AVERAGE LIST PRICE	\$487,482	↓	\$521,635
ACTIVE REO LISTINGS	42	↑	29
MONTHS SUPPLY	5.54	↑	4.9
LIST TO SALES PRICE	98.1%	↑	96.63%
MEDIAN SALES PRICE	\$351,000	↑	\$326,500
SALES CLOSED	870	↓	1,003
AVERAGE DAYS ON MARKET	81	↑	74

Additional Market Data: Flagler & Volusia: fewer homes for sale, steady prices
Active residential listings fell to 4,821, down 13.4% from a year ago. Homes that sold went faster (81 days on average vs. 89) and closer to asking: 98.1% of list price, the strongest of 2026. The median sale price held at \$351,000. Closed sales slipped to 870 (990 last September) as mortgage rates climbed late in the month, leaving 5.54 months of supply, about where it stood a year ago (5.62).

What we're watching: New construction remains a big share of our market, and much of it never enters the MLS. Builder incentives keep competing with resale sellers, while well-priced, move-in-ready homes are still selling quickly.

**We have found a way to more accurately compile multiple data sources for this information. Therefore, the "movement" numbers will appear skewed this month, but will be more complete going forward.*

Information provided for this market by **David Petkovsek at Realty Exchange LLC.**
Cell Phone: (386) 627-3182 | Email: dave@realtyexchangefl.com



MONTHLY MARKET TRENDS ORLANDO, FLORIDA

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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	15,907	↑	15,565
NEW LISTINGS	4,363	↑	4,362
PENDING LISTINGS	2,363	↓	2,813
AVERAGE LIST PRICE	\$537,512	↑	\$523,595
ACTIVE REO LISTINGS	156	↑	135
MONTHS SUPPLY	5	↔	5
LIST TO SALES PRICE	96.9%	↑	96.2%
MEDIAN SALES PRICE	\$396,490	↑	\$396,250
SALES CLOSED	2,929	↓	3,116
AVERAGE DAYS ON MARKET	75	↑	72

Additional Market Data: The Orlando housing market continues to move toward a more balanced environment as mortgage rates, insurance costs, and affordability influence buyer decisions. September brought slightly more inventory and longer selling times, while the median sales price remained steady. For sellers, realistic pricing and strong presentation remain important. Orlando ranked No. 2 in the U.S. for long-distance move-in interest in the recent PODS Moving Trends Report Pulse Check, reinforcing its appeal as a relocation destination. While REO volumes remain relatively low, increasing lis pendens filings suggest potential future foreclosure activity worth monitoring. That interest, combined with Orlando's diverse employment base, supports Orlando's long-term appeal and creates opportunities for those who approach the market with a clear plan.



MONTHLY MARKET TRENDS TALLAHASSEE, FLORIDA

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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	1,090	↓	1,122
NEW LISTINGS	353	↓	405
PENDING LISTINGS	378	↓	400
AVERAGE LIST PRICE	\$400,015	↓	\$403,413
ACTIVE REO LISTINGS	19	↓	29
MONTHS SUPPLY	3.7	↓	3.8
LIST TO SALES PRICE	98%	↓	98.7%
MEDIAN SALES PRICE	\$349,950	↑	\$346,000
SALES CLOSED	286	↓	298
AVERAGE DAYS ON MARKET	65	↑	60

Additional Market Data: Inventory is still high and months of supply of inventory still hovers around 3.5 months. Cash sales are starting to pick back up and is now around 20%. This is significant on our market as investors have not really been active. Medium time to sale is 65 days and is down a little this month. Average sales price continues to climb as buyers are choosing move in ready or new construction. REO inventory is slightly down but the ones that have not sold have very high days on market (over 120 days). Feedback on our listings are that the buyer does not want to do repairs so they opt to a more expensive, many times smaller, home that is move in ready. Pending sales are down 25% as buyers are stepping out of the market and inventory is down slightly as many homes are being taken off the market.

Information provided for this market by **Danielle Galvin** at **1st Choice Real Estate**.
Cell Phone: 850-933-5094 | Email: 1stchoice.danielle@gmail.com



MONTHLY MARKET TRENDS TAMPA BAY, FLORIDA

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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	24,687	↓	25,786
NEW LISTINGS	5,480	↓	5,980
PENDING LISTINGS	6,552	↑	6,325
AVERAGE LIST PRICE	\$522,000	↑	\$523,000
ACTIVE REO LISTINGS	185	↓	270
MONTHS SUPPLY	5.7	↓	6.3
LIST TO SALES PRICE	96.5%	↑	95.5%
MEDIAN SALES PRICE	\$467,700	↓	\$480,000
SALES CLOSED	3,987	↓	5,345
AVERAGE DAYS ON MARKET	49	↓	57

Additional Market Data: The Pinellas, Hillsborough and Pasco residential markets remain active, with buyers having time to compare options and negotiate. September 2026 reports showed 24,687 active listings across the three counties. Single-family homes typically reached contract in 35–43 days, while condos and townhomes took 48–74 days. Inventory levels, property condition, location and pricing influence market performance, with condo association costs and ownership expenses also affecting buyer decisions. Luxury listings raise average asking prices, while changes in the mix of homes sold can shift median sale prices without indicating an equal change in every property's value. Competitive pricing and strong presentation remain important for sellers.



MONTHLY MARKET TRENDS CHICAGO, ILLINOIS

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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	15,293	↑	15,103
NEW LISTINGS	11,932	↓	12,148
PENDING LISTINGS	1,782	↓	1,993
AVERAGE LIST PRICE	\$565,007	↑	\$564,074
ACTIVE REO LISTINGS	153	↑	142
MONTHS SUPPLY	2.13	↑	1.82
LIST TO SALES PRICE	99.9%	↓	100.21%
MEDIAN SALES PRICE	\$385,000	↓	\$395,000
SALES CLOSED	7,163	↓	8,199
AVERAGE DAYS ON MARKET	24	↑	23

Additional Market Data: The Greater Chicago real estate market remains stable, with limited inventory continuing to support home values despite a seasonal slowdown in sales activity. The September 2026 median sales price was \$385,000, down 2.53% from August but up 6.94% year over year. The average sales price increased 7.71% year over year to \$493,420. Closed sales declined 3.45% compared to September 2025, while average days on market decreased slightly to 24 days from 25 days a year ago. Inventory remains tight, with 15,293 properties available, down 10.54% year over year, and just 2.13 months of supply. New listings also declined 8% from last year. Properties continue to sell close to asking price, with a sales price to list price ratio of 99.9%. While higher prices and affordability concerns may be limiting buyer activity, low inventory continues to favor sellers, particularly for well-priced properties in good condition. Overall, the market remains competitive, although buyers are becoming more selective regarding condition and pricing.

Information provided for this market by **Patti Furman** at **Coldwell Banker Realty**.
Cell Phone: 312-545-6375 | Email: patti@pattifurman.com



MONTHLY MARKET TRENDS BALTIMORE, MARYLAND

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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	5,853	↑	5,464
NEW LISTINGS	2,898	↓	2,928
PENDING LISTINGS	1,369	↓	1,474
AVERAGE LIST PRICE	\$617,375	↓	\$630,525
ACTIVE REO LISTINGS	57	↓	61
MONTHS SUPPLY	2.6	↑	2.1
LIST TO SALES PRICE	99.3%	↑	99.2%
MEDIAN SALES PRICE	\$445,000	↓	\$467,750
SALES CLOSED	1,960	↓	2,207
AVERAGE DAYS ON MARKET	32	↑	29

Additional Market Data: The Baltimore MSA housing market is showing signs of cooling as affordability challenges and rising mortgage rates weigh on buyer activity. In September 2026, the median sold price was \$445,000, unchanged from a year ago. New pending sales declined 14.9% year-over-year, while showing activity fell 12.5%, indicating reduced buyer engagement. Active listings increased 21.2% year-over-year, providing buyers with more choices and increasing competition among sellers. The median days on market rose to 32 days, thirteen days longer than last year. Elevated borrowing costs, economic uncertainty, and limited affordability continue to influence purchasing decisions. Market conditions vary by price range and location, with competitively priced, well-maintained homes generally better positioned to attract buyers. Sellers may need to consider strategic pricing, property preparation, and concessions to remain competitive. Overall, the market is transitioning toward a more balanced environment, making accurate pricing and effective marketing increasingly important.

Information provided for this market by **Melanie Gamble** at **212 Degrees Realty**.
Cell Phone: 301-343-8538 | Email: melanie.gamble@212degreesrealtyllc.com



MONTHLY MARKET TRENDS SO. MARYLAND, MARYLAND

**USREO
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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	6,564	↑	6,009
NEW LISTINGS	3,045	↑	2,681
PENDING LISTINGS	904	↓	1,012
AVERAGE LIST PRICE	\$635,958	↑	\$626,702
ACTIVE REO LISTINGS	81	↓	87
MONTHS SUPPLY	3.7	↑	3
LIST TO SALES PRICE	99.90%	↑	98.70%
MEDIAN SALES PRICE	\$499,900	↓	\$500,000
SALES CLOSED	1,554	↓	1,742
AVERAGE DAYS ON MARKET	36	↑	34

Additional Market Data: The housing market across Prince George's, Calvert, Charles, and Montgomery counties is showing signs of moderation as elevated mortgage rates and affordability challenges weigh on buyer activity. Across the broader region, pending sales and showing activity have declined, while active listings have increased, giving buyers more choices and creating greater competition among sellers. Home prices remain generally resilient, but appreciation is slowing, and market conditions vary by county, neighborhood, and price range. Economic uncertainty and higher borrowing costs are prompting buyers to be more selective and cautious. Well-maintained homes priced appropriately for current market conditions continue to attract interest, while overpriced properties may require price adjustments, improved marketing, or seller concessions. Overall, the market is becoming more balanced, making realistic pricing, property preparation, and flexibility increasingly important for sellers while creating additional negotiating opportunities for buyers.

Information provided for this market by **Melanie Gamble** at **212 Degrees Realty**.

Cell Phone: 301-343-8538 | Email: melanie.gamble@212degreesrealtyllc.com



MONTHLY MARKET TRENDS DETROIT, MICHIGAN

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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	11,628	↑	11,061
NEW LISTINGS	3,478	↓	3,631
PENDING LISTINGS	4,043	↓	4,383
AVERAGE LIST PRICE	\$315,000	↓	\$324,500
ACTIVE REO LISTINGS	204	↓	219
MONTHS SUPPLY	3.2	↑	3
LIST TO SALES PRICE	99%	↑	98.7%
MEDIAN SALES PRICE	\$310,000	↓	\$320,000
SALES CLOSED	3,730	↓	4,031
AVERAGE DAYS ON MARKET	28	↓	34

Additional Market Data: The Metro Detroit housing market continued moving toward a more balanced environment in September. Inventory increased while sales activity slowed, giving buyers more options heading into the fall. The regional median sales price was \$310,000, down from \$320,000 in August but still 5.1% higher than September 2025. Oakland County recorded a median of \$383,500, Macomb reached \$281,500 and Wayne finished at \$219,950. Metro Detroit had 3.2 months of inventory, while sellers received an average of 99.0% of their asking price. Homes averaged 28 days on market. With more listings available and fewer closings, buyers have additional negotiating room, but well-priced homes continue to move quickly. Accurate pricing, condition and presentation remain increasingly important for sellers.

Information provided for this market by **Sam Hantosh** at **RE/MAX Team 2000**.
Cell Phone: 313-283-2228 | Email: sam.hantosh@gmail.com



MONTHLY MARKET TRENDS MINNEAPOLIS, MINNESOTA

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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	33,847	↑	33,265
NEW LISTINGS	6,319	↑	6,205
PENDING LISTINGS	n/a		n/a
AVERAGE LIST PRICE	\$520,211	↑	\$518,806
ACTIVE REO LISTINGS	n/a		n/a
MONTHS SUPPLY	3	↔	3
LIST TO SALES PRICE	99.9%	↓	99.9%
MEDIAN SALES PRICE	\$395,500	↓	\$405,000
SALES CLOSED	3,784	↓	4,352
AVERAGE DAYS ON MARKET	34	↑	32

Additional Market Data: Minneapolis homebuyers had more options in September as listings reached their highest level since 2020. Despite increased inventory, the market remained active, while price growth slowed, giving buyers slightly more leverage. Minneapolis ranked third among the nation's 40 largest housing markets for annual home sales performance, behind Orlando and San Francisco. Sales declined across all major property types year over year. Condo sales fell 7.8%, single-family home sales dipped 0.3%, and townhome sales declined 0.9%. The median home sale price rose 1.3% year over year to \$405,000, compared with a 2.1% increase nationally to \$395,000. Minneapolis ranked 23rd among the top 40 markets for annual median price growth. The local median price increased by \$5,055, while the national median rose by \$8,000. Minneapolis remained a higher-priced market, with its median sale price 2.5% above the national median. It ranked 24th among the 40 largest U.S. housing markets by price. September's median price of \$405,000 was just below the market's peak of \$410,000, recorded in June 2026.

Information provided for this market by **Scott Rodman** at **Realty Executives Top Results**.

Cell Phone: 612-229-7268 | Email: scott@rodmanhomes.com



MONTHLY MARKET TRENDS ST. LOUIS, MISSOURI

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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	6,055	↓	6,094
NEW LISTINGS	2,483	↑	2,392
PENDING LISTINGS	2,321	↓	2,369
AVERAGE LIST PRICE	\$401,706	↑	\$379,461
ACTIVE REO LISTINGS	148	↑	130
MONTHS SUPPLY	1.63	↓	2.4
LIST TO SALES PRICE	99.5%	↓	100.43%
MEDIAN SALES PRICE	\$323,983	↑	\$308,500
SALES CLOSED	3,707	↑	2,469
AVERAGE DAYS ON MARKET	40	↑	34

Additional Market Data: This past month looks more in line with historical trends. Active listings, new listings, and pending listings are all relatively stable, with slight increases in average list prices and median sales prices. Increased interest rates have created some concern for buyers, as their buying power is not as great. There is a marked change in showings and interest, a cool down effect and there is a decrease in showings, open house traffic, and there has been a decrease in offer activity in general. This is in advance of our typical holiday slow down and usual season changes in the market.



MONTHLY MARKET TRENDS LAS VEGAS, NEVADA

**USREO
PARTNERS**

SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	11,352	↑	10,763
NEW LISTINGS	1,676	↓	1,837
PENDING LISTINGS	787	↓	915
AVERAGE LIST PRICE	\$549,000	↓	\$555,000
ACTIVE REO LISTINGS	84	↑	73
MONTHS SUPPLY	4	↔	4
LIST TO SALES PRICE	96%	↔	96%
MEDIAN SALES PRICE	\$470,000	↓	\$475,000
SALES CLOSED	400	↓	439
AVERAGE DAYS ON MARKET	47	↑	45

Additional Market Data: The Las Vegas market cooled in September, with rising mortgage rates, fewer sales, and more homes available without offers. Buyers have more choices and potentially greater negotiating power than they did a year ago. We are seeing more REO's being released, I myself have received 4 new REO's in the last 2 weeks.



MONTHLY MARKET TRENDS NEWARK, NEW JERSEY

**USREO
PARTNERS**

SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	6,500	↓	6,585
NEW LISTINGS	2,690	↓	2,735
PENDING LISTINGS	3,920	↓	4,180
AVERAGE LIST PRICE	\$733,000	↓	\$735,000
ACTIVE REO LISTINGS	69	↑	67
MONTHS SUPPLY	2.9	↑	2.8
LIST TO SALES PRICE	102%	↓	102.3%
MEDIAN SALES PRICE	\$656,000	↑	\$642,000
SALES CLOSED	2,650	↓	2,790
AVERAGE DAYS ON MARKET	42	↑	37

Additional Market Data: September 2026 reflected a noticeable seasonal moderation across Essex, Union, Morris, Somerset, Sussex and Hunterdon counties. Active inventory remained elevated while new listings, pending activity and closed sales softened as mortgage rates moved above 7%, increasing affordability pressure and slowing buyer activity. Average supply increased to approximately 2.9 months and marketing times lengthened, giving buyers somewhat more negotiating leverage. Despite slower transaction velocity, pricing remained resilient and well-positioned properties continued to command strong list-to-sale ratios, particularly in Essex, Morris, Union and Somerset. REO inventory remains a very small component of overall housing supply, although foreclosure activity continues to trend higher nationally. As the market moves deeper into fall, higher financing costs, borrower stress, price reductions and the upstream default pipeline remain important indicators to monitor.

Information provided for this market by **Nick Verdi** at **Keystone Realty Group**.
Cell Phone: 973-769-1009 | Email: nick@nickverdi.com



MONTHLY MARKET TRENDS CATSKILLS REGION, NEW YORK

**USREO
PARTNERS**

SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	681	↓	723
NEW LISTINGS	126	↓	168
PENDING LISTINGS	85	↑	70
AVERAGE LIST PRICE	\$429,000	↑	\$425,000
ACTIVE REO LISTINGS	1	↔	1
MONTHS SUPPLY	9.33	↓	9.9
LIST TO SALES PRICE	98%	↑	95.70%
MEDIAN SALES PRICE	\$400,000	↑	\$327,500
SALES CLOSED	71	↓	84
AVERAGE DAYS ON MARKET	54	↔	54

Additional Market Data: Sullivan County continued to run well behind the Hudson Valley in September, though with some signs of firming. Active listings fell to 681 from 723 and new listings dropped to 126 from 168, while new pendings rose to 85 from 70. Closed sales slipped to 71 from 84. Months supply improved slightly to 9.33 from 9.90 but remains more than double the Hudson Valley's 4.56, reflecting the Catskills' seasonal and second-home buyer base. Sellers continued to negotiate: the list-to-sale ratio was 97.9%, up from 95.7% but still below 100%, and median days on market held at 54, well above the Hudson Valley's 40. The median sales price rose to \$400,000 from \$327,500; on a small closed-sale base this largely reflects mix rather than appreciation. The median list price was steady at \$429,000. REO activity was minimal, with one REO new listing, so distressed inventory is not a factor.

Information provided for this market by **Lee A. Raphael** at **River Realty Services**.

Cell Phone: 914-474-8146 | Email: LRaphael@riverrealty.com



MONTHLY MARKET TRENDS HUDSON VALLEY REGION, NEW YORK

**USREO
PARTNERS**

SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	5,031	↑	4,769
NEW LISTINGS	1,930	↑	1,627
PENDING LISTINGS	1,140	↓	1,268
AVERAGE LIST PRICE	\$700,720	↑	\$695,112
ACTIVE REO LISTINGS	32	↑	27
MONTHS SUPPLY	4.56	↑	4.41
LIST TO SALES PRICE	101.60%	↓	102.6%
MEDIAN SALES PRICE	\$705,577	↓	\$818,274
SALES CLOSED	1,257	↓	1,524
AVERAGE DAYS ON MARKET	40	↑	33

Additional Market Data: The Hudson Valley market cooled seasonally in September as supply built and transaction volume eased. Active listings rose 5.5% to 5,031 and new listings jumped 18.6% to 1,930, while new pendings slipped 10.1% to 1,140 and closed sales fell 17.5% to 1,257. Weighted months supply edged up to 4.56 from 4.41, signaling slower absorption but a still-balanced market. Pricing largely held: the weighted list-to-sale ratio was 101.6% and median days on market lengthened to 40 from 33. The weighted median sales price eased to \$705,577, driven mostly by mix, as Westchester accounted for a smaller share of closings. Westchester remained the tightest county at 2.55 months of supply and a 105.0% list-to-sale ratio, though its new listings surged to 544. Putnam (102.1%), Dutchess (101.0%) and Rockland (100.8%) also sold above list. Columbia was the softest at 6.64 months of supply, followed by Ulster at 5.77 and Orange at 5.15, with Orange and Ulster dipping just below 100% of list. REO new listings totaled 32, led by Orange with 12 and Westchester with 11, so distressed inventory remains a minor factor.

Information provided for this market by **Lee A. Raphael** at **River Realty Services**.
Cell Phone: 914-474-8146 | Email: LRaphael@riverrealty.com



MONTHLY MARKET TRENDS NEW YORK, NEW YORK – NASSAU

**USREO
PARTNERS**

SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	2,769	↑	2,723
NEW LISTINGS	1,084	↓	1,142
PENDING LISTINGS	827	↓	869
AVERAGE LIST PRICE	\$1,004,598	↓	\$1,015,133
ACTIVE REO LISTINGS	59	↑	54
MONTHS SUPPLY	3.3	↔	3.3
LIST TO SALES PRICE	101%	↓	101.3%
MEDIAN SALES PRICE	\$830,000	↓	\$880,000
SALES CLOSED	901	↓	1,034
AVERAGE DAYS ON MARKET	43	↑	40

Additional Market Data: In September, the real estate market across Queens, Nassau, and Suffolk counties remained resilient, with home prices generally trending upward compared with last year. Queens continued to see steady demand, although buyers had somewhat more time to make decisions. Suffolk County showed positive momentum, supported by continued demand and limited inventory. Nassau County maintained the highest home values in the region, with prices holding firm despite affordability challenges. Overall, the Long Island and Queens markets remained competitive, with limited inventory helping support home values. Well-priced properties continued to attract buyer interest, while buyers remained selective and mindful of affordability.



MONTHLY MARKET TRENDS NEW YORK, NEW YORK – QUEENS

**USREO
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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	3,951	↑	3,844
NEW LISTINGS	1,066	↓	1,075
PENDING LISTINGS	608	↓	614
AVERAGE LIST PRICE	\$677,503	↑	\$673,288
ACTIVE REO LISTINGS	65	↑	60
MONTHS SUPPLY	6.8	↑	6.6
LIST TO SALES PRICE	97.8%	↑	97.6%
MEDIAN SALES PRICE	\$653,000	↓	\$665,000
SALES CLOSED	579	↑	557
AVERAGE DAYS ON MARKET	77	↑	73

Additional Market Data: In September, the real estate market across Queens, Nassau, and Suffolk counties remained resilient, with home prices generally trending upward compared with last year. Queens continued to see steady demand, although buyers had somewhat more time to make decisions. Suffolk County showed positive momentum, supported by continued demand and limited inventory. Nassau County maintained the highest home values in the region, with prices holding firm despite affordability challenges. Overall, the Long Island and Queens markets remained competitive, with limited inventory helping support home values. Well-priced properties continued to attract buyer interest, while buyers remained selective and mindful of affordability.



MONTHLY MARKET TRENDS NEW YORK, NEW YORK – SUFFOLK

**USREO
PARTNERS**

SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	3,811	↑	3,767
NEW LISTINGS	1,554	↑	1,159
PENDING LISTINGS	1,134	↓	1,257
AVERAGE LIST PRICE	\$899,180	↑	\$890,315
ACTIVE REO LISTINGS	91	↑	85
MONTHS SUPPLY	3.5	↑	3.3
LIST TO SALES PRICE	102.2%	↓	102.6%
MEDIAN SALES PRICE	\$725,000	↓	\$735,000
SALES CLOSED	1,224	↓	1,345
AVERAGE DAYS ON MARKET	42	↑	41

Additional Market Data: In September, the real estate market across Queens, Nassau, and Suffolk counties remained resilient, with home prices generally trending upward compared with last year. Queens continued to see steady demand, although buyers had somewhat more time to make decisions. Suffolk County showed positive momentum, supported by continued demand and limited inventory. Nassau County maintained the highest home values in the region, with prices holding firm despite affordability challenges. Overall, the Long Island and Queens markets remained competitive, with limited inventory helping support home values. Well-priced properties continued to attract buyer interest, while buyers remained selective and mindful of affordability.



MONTHLY MARKET TRENDS PHILADELPHIA, PENNSYLVANIA

**USREO
PARTNERS**

SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	11,837	↑	11,323
NEW LISTINGS	5,047	↑	4,613
PENDING LISTINGS	2,362	↓	2,507
AVERAGE LIST PRICE	\$476,800	↑	\$434,400
ACTIVE REO LISTINGS	397	↑	369
MONTHS SUPPLY	2.7	↑	2.32
LIST TO SALES PRICE	90%	↓	94%
MEDIAN SALES PRICE	\$430,300	↓	\$455,000
SALES CLOSED	2,723	↓	3,193
AVERAGE DAYS ON MARKET	26	↓	28

Additional Market Data: Home Demand Index for the Philadelphia metro area is down from last month and below what it was one year ago. Demand by home type in Philadelphia this period ranges from a high in the entry-level condo tier to a low in the luxury single-family tier, with most segments softening month over month. The condo tiers continue to screen strongest, while single-family demand sits lower, a pattern driven by the affordability advantage condos hold at their price points. Entry single-family remains the most payment-sensitive tier, and mid-range single-family, luxury single-family, and the townhouse/rowhouse all easing on the month. Inventory generally sits in the two-to-five-month range across tiers, keeping the metro balanced-to-soft rather than tight. Inventory is increasing, sales prices are decreasing, sales closed are decreasing, REO inventory is increasing and months in inventory is increasing all confirming a softening in the Philadelphia metro real estate market.



MONTHLY MARKET TRENDS SOUTH CENTRAL, PENNSYLVANIA

**USREO
PARTNERS**

SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	2,236	↑	2,025
NEW LISTINGS	1,857	↓	1,977
PENDING LISTINGS	1,598	↓	1,711
AVERAGE LIST PRICE	\$410,457	↑	\$346,687
ACTIVE REO LISTINGS	20	↑	19
MONTHS SUPPLY	1.89	↓	1.92
LIST TO SALES PRICE	99.3%	↓	99.5%
MEDIAN SALES PRICE	\$315,000	↓	\$359,653
SALES CLOSED	1,935	↓	2,071
AVERAGE DAYS ON MARKET	25	↑	22

Additional Market Data: The gap between seller and buyer expectations is widening, with higher list prices, fewer pending and closed sales, and slightly longer marketing times. Buyer discounts now average 0.7%, yet homes still sell near asking price in under 30 days, with less than two months of inventory. REO activity remains minimal, with little market impact. Distressed properties average 41.45% below traditional sale prices, partly reflecting differences in condition and property characteristics. Data covers Reading, Lancaster, Lebanon, Harrisburg, and York, PA.



MONTHLY MARKET TRENDS LEHIGH VALLEY, PENNSYLVANIA

USREO
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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	784	↑	704
NEW LISTINGS	730	↑	546
PENDING LISTINGS	875	↑	668
AVERAGE LIST PRICE	\$553,429	↑	\$440,834
ACTIVE REO LISTINGS	8	↓	10
MONTHS SUPPLY	2.22	↑	1.92
LIST TO SALES PRICE	100.65%	↑	100.44%
MEDIAN SALES PRICE	\$375,050	↔	\$375,050
SALES CLOSED	611	↓	676
AVERAGE DAYS ON MARKET	23	↓	22

Additional Market Data: The market remains stable with a nominal statistical change month after month. Sellers still hold the upper hand with homes selling for above asking process in an average of 23 days. Homes have appreciated in value by over 7% year over year. REO sales remain minimal with no effect on the market. This data covers the counties of Lehigh and Northampton, PA.



MONTHLY MARKET TRENDS DALLAS/FT WORTH, TEXAS

**USREO
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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	63,413	↑	63,020
NEW LISTINGS	19,284	↓	19,597
PENDING LISTINGS	5,916	↓	6,645
AVERAGE LIST PRICE	\$444,326	↑	\$427,286
ACTIVE REO LISTINGS	404	↓	527
MONTHS SUPPLY	5	↔	5
LIST TO SALES PRICE	100%	↔	100%
MEDIAN SALES PRICE	\$308,000	↑	\$305,000
SALES CLOSED	11,633	↓	12,467
AVERAGE DAYS ON MARKET	57	↑	53

Additional Market Data: The Dallas/Fort Worth housing market showed mixed signals in September 2026, with active listings increasing slightly from 63,020 to 63,413, while new listings declined to 19,284 and pending sales fell from 6,645 to 5,916. Closed sales decreased from 12,467 to 11,633, suggesting buyers are becoming more cautious. The average list price rose from \$427,286 to \$444,326, while the median sales price increased modestly to \$308,000. Average days on market increased from 53 to 57, indicating homes are taking longer to sell. Active REO listings declined from 527 to 404. Rising mortgage rates, which climbed above 7% in September, and ongoing affordability challenges are likely contributing to softer buyer demand. National trends also show fewer pending sales and more price reductions as sellers adjust expectations. With more time needed to secure a buyer, accurate pricing and strategic marketing remain essential in the DFW market.

Information provided for this market by **Sharon Bartlett** at **Seeto Realty**.

Cell Phone: 214-914-9272 | Email: sharon@sharonbartlett.com



MONTHLY MARKET TRENDS HOUSTON, TEXAS

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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	79,280	↑	78,001
NEW LISTINGS	27,263	↓	27,881
PENDING LISTINGS	5,117	↓	5,407
AVERAGE LIST PRICE	\$355,901	↑	\$348,630
ACTIVE REO LISTINGS	480	↓	502
MONTHS SUPPLY	6.5	↔	6.5
LIST TO SALES PRICE	100%	↔	100%
MEDIAN SALES PRICE	\$212,991	↑	\$152,100
SALES CLOSED	12,183	↓	13,568
AVERAGE DAYS ON MARKET	77	↑	73

Additional Market Data: September brought a rate shock that pushed Greater Houston further into buyer's market territory. The 30-year fixed rose every week, from 6.71% on Sept. 3 to 7.03% by Sept. 24 after the Fed's Sept. 16 hike, and reached 7.40% in early October, the highest since late 2023. Higher payments thinned the buyer pool; HAR's weekly data shows pending contracts running about 23% below last year, with showings and open house traffic also down. With supply already at 6.5 months in August, inventory sits above the six-month line that defines a buyer's market, so buyers have time, choices and leverage on price, repairs and closing costs. What buyers want is clear: turnkey, move-in-ready homes with updated kitchens and baths, newer roofs and HVAC, and manageable insurance and tax costs. Homes that need work sit longer and sell at steep discounts as investors stay cautious on financing and carrying costs. Sellers who price right in the first two weeks and show a clean, repaired home still sell; those chasing the market do not. Expect a slow fourth quarter unless rates ease which is not likely.

Information provided for this market by **Derek Montes** at **Montes & Associates Realty**.
Cell Phone: (832) 434-4509 | Email: derekmontesrealestate@gmail.com



MONTHLY MARKET TRENDS SEATTLE/TACOMA, WASHINGTON

**USREO
PARTNERS**

SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	13,799	↑	13,269
NEW LISTINGS	3,391	↑	3,262
PENDING LISTINGS	2,476	↓	2,683
AVERAGE LIST PRICE	\$1,007,200	↑	\$759,000
REO LISTINGS	64	↑	58
MONTHS SUPPLY	5.32	↑	4.56
LIST TO SALES PRICE	98.03%	↓	98.46%
MEDIAN SALES PRICE	\$750,000	↓	\$769,000
SALES CLOSED	2,595	↓	2,905
AVERAGE DAYS ON MARKET	50	↑	41

Additional Market Data: The Puget Sound real estate market has slowed to a crawl, and the numbers tell the story! Economic uncertainty, the war in Iran, rising gas prices, persistent inflation, and elevated mortgage rates have buyers nervous and sitting on the sidelines. Inventory has surged 24.5% year-over-year, while pending sales have fallen 15.1%. Even more concerning, scheduled showings are DOWN 12.9%, and keybox openings have declined 6.5%. Buyers aren't just hesitant to make offers; fewer are even looking at homes! After 39 years in real estate and mortgage lending, I've learned that uncertainty can paralyze a market faster than almost anything else. Sellers are competing for fewer active buyers, homes are sitting longer, and pricing strategy has never been more critical. But here's the opportunity: Buyers who CAN act have more choices and negotiating leverage than they've enjoyed in years. Sellers must recognize that yesterday's pricing strategies won't necessarily work in today's market. The market isn't dead. It's waiting for confidence to return. And those who adapt will win!

Information provided for this market by **Ed Laine** at **eXp Realty, LLC**.

Cell Phone: 206-229-5515 | Email: ed.laine@exprealty.com



MONTHLY MARKET TRENDS WASHINGTON, DC

**USREO
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SEPTEMBER 2026

CATEGORIES	Sept 2026	Increase/ Decrease	Prior Month
ACTIVE LISTINGS	3,289	↑	2,749
NEW LISTINGS	1,438	↑	788
PENDING LISTINGS	230	↑	223
AVERAGE LIST PRICE	\$811,619	↑	\$756,466
ACTIVE REO LISTINGS	70	↓	71
MONTHS SUPPLY	7.3	↑	4.4
LIST TO SALES PRICE	97.90%	↓	98.50%
MEDIAN SALES PRICE	\$656,500	↓	\$675,000
SALES CLOSED	402	↓	446
AVERAGE DAYS ON MARKET	46	↓	53

Additional Market Data: The Washington, DC housing market is experiencing slower buyer activity and increased competition among sellers. In September 2026, the median sold price was approximately \$660,000, down 2.9% year-over-year, while closed sales declined 6.8%. Active listings increased 1.1%, giving buyers more options and greater negotiating leverage. Higher mortgage rates, affordability challenges, economic uncertainty, and changing buyer confidence are contributing to the slower pace. Properties that are overpriced or need significant repairs may experience longer marketing periods or require price reductions and seller concessions. Well-maintained, competitively priced homes in desirable locations continue to attract interest. Overall, accurate pricing, effective marketing, and flexibility with terms and incentives are increasingly important to achieving a successful sale in the current market.

Information provided for this market by **Melanie Gamble** at **212 Degrees Realty**.
Cell Phone: 301-343-8538 | Email: melanie.gamble@212degreesrealtyllc.com

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BROKER MEMBERS



LINDA GONZALEZ

Prestige Realty

(480) 703-3012

lindabox123@gmail.com

Lic #SA570109000

**GLENDALE,
ARIZONA**



RAMIRO GONZALEZ

Prestige Realty

(480) 593-8438

rogsellsaz@gmail.com

Lic #BR568659000

**PHOENIX,
ARIZONA**



JENNIFER RASCON

EXIT REALTY YUMA

(928) 271-9700

jennifersellsyuma@gmail.com

Lic #BR626741000

**YUMA,
ARIZONA**



ALIFONSO MENDOZA

Keller Williams Property Team

(209) 676-1819

mercedcountyrealtor@gmail.com

Lic #01760709

**ATWATER,
CALIFORNIA**



JEFF RUSSELL

**Russell Realty Group,
brokered by eXp Realty**

(949) 200-7055

rrg@russellrealtygrp.com

Lic #01275750

**BREA,
CALIFORNIA**

BROKER MEMBERS



ANGELICA SUAREZ

Estate Properties

(310) 261-7700
angelica@angelicasuarez.com
Lic #01078617

**CARSON,
CALIFORNIA**



MANUEL CHAVEZ JR

M.C. Real Estate Corp

(559) 630-5637
manuel@mcrealestatecorp.com
Lic #01525575

**FRESNO,
CALIFORNIA**



ALISA KROHN

Property Masters Realty

(818) 209-8695
akrohn@pmrsells.com
Lic #01348287

**GLENDALE,
CALIFORNIA**



CAROLE STURIM

Coldwell Banker

(949) 701-1200
repro@cox.net
Lic #01084597

**LAGUNA
NIGUEL,
CALIFORNIA**



RICHARD WILSON

Vylla Home Inc

(925) 305-1642
rick.wilson@vylla.com
Lic #01461634

**MARTINEZ,
CALIFORNIA**

BROKER MEMBERS



MONICA HILL

USREOP Regional Representative

MVP Real Estate & Investments

(951) 834-8687

mvp4realestate@gmail.com

Lic #01201175

**MENIFEE,
CALIFORNIA**



MIKE NOVAK-SMITH

NOVAK-SMITH & ASSOCIATES INC

(951) 236-7256

mikenovaksmith@cs.com

Lic #01032149

**MORENO
VALLEY,
CALIFORNIA**



TROY CAPELL

USREOP BOD, President

Quantum Realtors / eXp Realty

(818) 571-7390

troy@usreop.com

Lic #01189253

**NEWBURY
PARK,
CALIFORNIA**



DOROTHY MACIAS

Commonwealth Realty Homes

(562) 418-4062

dorothy.excellencere@gmail.com

Lic #02044858

**PICO RIVERA,
CALIFORNIA**



JULIO SALDANA

Realty Plus

(714) 343-1436

ocmultiplelistings@gmail.com

Lic #01736716

**PLACENTIA,
CALIFORNIA**

BROKER MEMBERS



PATRICIA ROCHA

Crown Royal Real Estate Inc

(909) 731-6559

patricia.rocha@crownroyalrealestate.com

Lic #01280072

**RANCHO
CUCAMONGA,
CALIFORNIA**



PAUL BOUDIER

Keller Williams Realty

(916) 919-5775

paulboudier@knowledge.com

Lic #01179722

**ROSEVILLE,
CALIFORNIA**



SERINA LOWDEN

USREOP Regional Representative

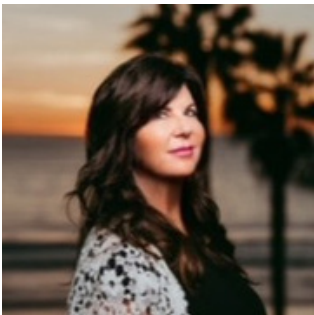
All City Homes

(209) 304-5841

serina@serinalowden.com

Lic #01365745

**SACRAMENTO,
CALIFORNIA**



JENNIFER BLAKE

LuXre Realty

(949) 463-0626

jblake4re@aol.com

Lic #00974839

**SAN
CLEMENTE,
CALIFORNIA**



JOSEPH GUMMERSON

Joseph Gummerson, Broker

(619) 347-7027

joegummerson@gmail.com

Lic #01007506

**SAN DIEGO,
CALIFORNIA**

BROKER MEMBERS



ANH PHAM
SkyGroup Realty Inc.
(650) 380-6364
anh@skygrouprealtyinc.com
Lic #01432176

**SAN
FRANCISCO,
CALIFORNIA**



PHILIP BORODA
Coldwell Banker
Residential Brokerage
(310) 968-3844
philip.boroda1@gmail.com
Lic #00822192

**SHERMAN
OAKS,
CALIFORNIA**



ALFRED YOUNAN
Metro Realty Pros
(209) 202-4201
alfred@metro-realtypros.com
Lic #01718008

**TURLOCK,
CALIFORNIA**



SHAWN LUONG
Spectrum Realty Solutions
(626) 643-7090
reoagent@shawnuong.com
Lic #00857818

**WEST COVINA,
CALIFORNIA**



ROBERT PASSAFIUME
Waypoint Realty
(303) 809-7694
robert@waypointrealtyco.com
Lic #100079407

**THORNTON,
COLORADO**

BROKER MEMBERS



NICK MASTRANGELO

Coldwell Banker Realty

(203) 641-2100

nick.mastrangelo@cbmoves.com

Lic #REB 0756394

**ORANGE,
CONNECTICUT**



TAD YEATTER

Schooner Bay Realty, Inc.

(239) 297-1583

tad@sbrealtyinc.com

Lic #CQ157043

**CAPE
CORAL,
FLORIDA**



DANNY LEWIS

Lewis Real Estate Group, Inc

(954) 629-7905

danny@lregi.com

Lic #BK3039511

**CORAL
SPRINGS,
FLORIDA**



RAUL GONZALEZ

NuFront International Realty

(305) 785-3030

raul@nufrontrealty.com

Lic #BK3387917

**DORAL,
FLORIDA**



SCOTT KIEFER

Kiefer Realty

(352) 812-3645

kieferrealty@gmail.com

Lic #bk3020554

**DUNNELLON,
FLORIDA**

BROKER MEMBERS



DENISE MAHONEY

eXp Florida Realty

(954) 997-3222

denise@topfloridahouses.com

Lic #3087033

**FORT
LAUDERDALE,
FLORIDA**



RYAN COURSON

Core Realty LLC

(904) 762-5264

ryan@corerealtyusa.com

Lic #CQ1028418

**JACKSONVILLE,
FLORIDA**



WILLIAM RAMOS

Integrity Key Realty LLC

(904) 477-0767

william@integritykeyrealty.com

Lic #BK3069116

**JACKSONVILLE,
FLORIDA**



DAYNA GRIMMETT

Live Florida Realty

(863) 766-1187

dayna@liveflrealty.com

Lic #BK3535351

**LAKELAND,
FLORIDA**



JESSICA GRAHAM

ERA Grizzard Real Estate

(352) 504-7772

jessicagraham@eragrizzard.com

Lic #BK-671827

**LEESBURG,
FLORIDA**

BROKER MEMBERS



ADRIANA MONTES
Florida Dreams Realty Group
(321) 689-6258
adriana@floridadreamsrealty.com
Lic #BK3096165

**MIAMI,
FLORIDA**



EDDIE BLANCO
USREOP Regional Representative
Stratwell
(305) 684-8733
eddie@stratwellrealestate.com
Lic #0658938

**MIAMI LAKES,
FLORIDA**



EVELSI CONQUETH
Assurance Florida Realty
(954) 543-3810
evelsi@evelsiconqueth.com
Lic #3099671

**MIRAMAR,
FLORIDA**



JOSEPH DOHER
Berkshire Hathaway HomeServices
Results Realty
(407) 325-8163
broker@joedoher.com
Lic #BK594726

**ORLANDO,
FLORIDA**



DAVID PETKOVSEK
Realty Exchange LLC
(386) 627-3182
dave@realtyexchange.fl.com
Lic #BK3096504

**PALM COAST,
FLORIDA**

BROKER MEMBERS



PETER CHICOURIS

Equity Realty Suncoast

(727) 410-7064

pgc@equityrealtyinc.com

Lic#BK586338

**ST PETERSBURG,
FLORIDA**



STEVEN MODICA

USREOP BOD, Vice President

Real Estate Home Sales

(954) 270-7770

steve@realestatehomesales.com

Lic #431169

**SUNRISE,
FLORIDA**



TOM AND DANIELLE GALVIN

USREOP Regional Representative

1st Choice Real Estate

(850) 933-5094

1stchoice.danielle@gmail.com

Lic #BK595090

**TALLAHASSEE,
FLORIDA**



BRETT MATTHEWS

I Deal Real Estate, Inc

(954) 605-3325

brettmatthewspa@gmail.com

Lic #0494633

**WESTON,
FLORIDA**



APRIL LLOYD

EXP Realty

(404) 414-1629

april30317@gmail.com

Lic #293785

**ATLANTA,
GEORGIA**

BROKER MEMBERS



JACQUELINE (JAY) GOULDBOURNE

Gould Global Real Estate Co.

(770) 778-6562

jacqueline@thegouldglobal.com

Lic #300667

**LAWRENCEVILLE,
GEORGIA**



JOHN SHERWOOD

Worthmoore Realty

(404) 718-0056

jsherwood@worthmoorerealty.com

Lic #313226

**MARIETTA,
GEORGIA**



NIKKI CROWDER

Solutions First Realty

(678) 508-3878

nikki@solutionsfirstrealty.com

Lic #246766

**SNELLVILLE,
GEORGIA**



KIRBY PEARSON

Pearson Realty Group

(312) 805-0005

kirby@pearsonrealtygroup.com

Lic #471002409

**CHICAGO,
ILLINOIS**



GASPAR FLORES

Su Familia Real Estate Inc

(312) 656-6301

gflores.sfr@gmail.com

Lic #471-004257

**CHICAGO,
ILLINOIS**

BROKER MEMBERS



TAMMY ENGEL

ReMax Classic

(815) 482-3726

tammy@eshometeam.com

Lic #481.011128

GENOA,
ILLINOIS



PATTI FURMAN

Coldwell Banker

(312) 545-6375

patti@pattifurman.com

Lic #475.144230

GLENVIEW,
ILLINOIS



IVICA OTIS LAZICH

Capital Investment Realty Group Inc

(708) 692-7283

lazich2@yahoo.com

Lic #471009343

LYONS,
ILLINOIS



GEORGE & JULIE GREEN

Green Team Real Estate Services

(502) 439-7596

george@greenteamres.com

Lic #209408

LOUISVILLE,
KENTUCKY



ANTOINE JOHNSON

PowerhouseRealty, LLC

(301) 512-8088

mdbporeo@gmail.com

Lic #639992

BALTIMORE,
MARYLAND

BROKER MEMBERS



ED KOWALSKI

EXP Realty, LLC

(443) 619-2238

edwardjkowalski2@gmail.com

Lic #533030

**FULTON,
MARYLAND**



ANTHONY DOZIER

All Homes Realty, LLC

(301) 440-7226

realtordozier@gmail.com

Lic #514284

**LANHAM,
MARYLAND**



MELANIE GAMBLE

USREOP Regional Representative

212 Degrees Realty, LLC

(301) 343-8538

melanie.gamble@212degreesrealtyllc.com

Lic #530399

**UPPER
MARLBORO,
MARYLAND**



MICHAEL BALSITIS

Bellabay Realty LLC

(616) 813-5522

mike@bellabayrealty.com

Lic #6502346774

**CALEDONIA,
MICHIGAN**



SAM HANTOSH

RE/MAX Team 2000

(313) 283-2228

sam.hantosh@gmail.com

Lic #6501348723

**CANTON,
MICHIGAN**

BROKER MEMBERS



SHERRI SAAD
RE/MAX Leading Edge
(313) 598-5322
sherri.saad@comcast.net
Lic #6502392274

**DEARBORN
HEIGHTS,
MICHIGAN**



ALBERT HAKIM
City Real Estate Group
(586) 495-0010
albert@always sold.com
Lic #6502415090

**HARPER
WOODS,
MICHIGAN**



ANTHONY RAFFIN
RE/MAX First
(586) 634-4761
tony@raffinteam.com
Lic #6506044707

**ST CLAIR
SHORES,
MICHIGAN**



SCOTT RODMAN
Realty Executives Top Results
(612) 229-7268
scott@rodmanhomes.com
Lic #20433691

**BLAINE,
MINNESOTA**



PAMELA BUTLER
P.A.M. REALTY LLC
(404) 454-6767
pamrealtyoxford@gmail.com
Lic #23971

**OXFORD,
MISSISSIPPI**

BROKER MEMBERS



MICHAEL ZOUGLAS

REO Xpress

(314) 398-7778

mazouglas@gmail.com

Lic #2009013939

**ST LOUIS,
MISSOURI**



CATHY DAVIS

Mid America Property Partners

(314) 413-5279

cdavis@mappreo.com

Lic #1999108852

**ST PETERS,
MISSOURI**



MICHELLE SYBERG

Mid America Property Partners

(314) 503-6093

msyberg@mappreo.com

Lic #1999056881

**ST PETERS,
MISSOURI**



BRANDY WHITE ELK

Innovative Real Estate Strategies

(702) 858-4211

brandy@iresvegas.com

Lic #B.009698

**LAS VEGAS,
NEVADA**



JULIA FENG

Evernest Realty

(702) 588-1080

julia.evernestrealty@gmail.com

Lic #0144606

**LAS VEGAS,
NEVADA**

BROKER MEMBERS



SHELLY BRYANT

SBR Realty LLC

(609) 685-4569

sbryant@sbrrealtypros.com

Lic #0447024

**EWING,
NEW JERSEY**



FELICIA HANKERSON

Real Broker, LLC

(973) 868-8076

centraljerseyreoagent@gmail.com

Lic #9480623

**FAIRFIELD,
NEW JERSEY**



BILL FLAGG

ERA Queen City Realty

(908) 377-7700

bill@billflagg.com

Lic #8240797

**SCOTCH
PLAINS,
NEW JERSEY**



NICHOLAS VERDI

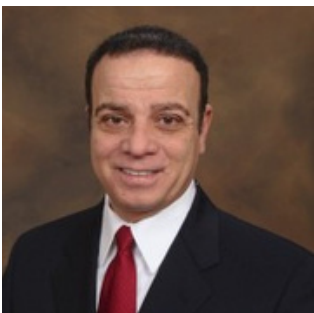
Keystone Reaty Group

(973) 769-1009

nickreo@aol.com

Lic #9700045NJ

**WEST ORANGE,
NEW JERSEY**



TOM MARCO

Tom Marco Real Estate

(917) 282-9737

tommarco@optonline.net

Lic #31 MA1016405

**BROOKLYN,
NEW YORK**

BROKER MEMBERS



DEBORAH BACCHUS

My Dream Home Realty Inc.

(347) 386-5868

deborah@mydhrny.com

Lic #10311205651

**FREEPORT,
NEW YORK**



DAMIEN COLEMAN

DAC Properties Corp

(516) 528-1531

dacproperties@aol.com

Lic #31CO1038953

**GARDEN CITY,
NEW YORK**



TODD YOVINO

USREOP Regional Representative

Island Advantage Realty

(516) 819-7800

todd@iarny.com

Lic #49YO0956714

**HAUPPAUGE,
NEW YORK**



LEE RAPHAEL

River Realty Services, Inc.

(914) 474-8146

lraphael@riverrealty.com

Lic #10311204404

**NEW WINDSOR,
NEW YORK**



MARK REBERT

**Berkshire Hathaway HomeServices
Homesale Realty**

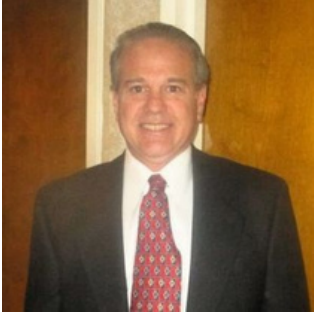
(717) 742-0778

mark@lancohomesale.com

Lic #RS317618

**LANCASTER,
PENNSYLVANIA**

BROKER MEMBERS



MITCHELL COHEN

Premier Real Estate, Inc.

(215) 837-3990

mittchellc@premierreo.net

Lic #RM061436A

PHILADELPHIA,
PENNSYLVANIA



LIBBY SOSINSKI

Keller Williams Realty

(412) 722-8344

libberated@aol.com

Lic #RS281248

PITTSBURGH,
PENNSYLVANIA



MIGUEL ORTIZ

Universal Properties RE LLC

(787) 244-1999

miguel@universalpropertiespr.com

Lic #E-129

HATILLO,
PUERTO RICO



CAROL MALAGA

Piramide Real Estate Brokers

(787) 672-1662

windy@piramide.com

Lic #PR

SAN JUAN,
PUERTO RICO



RITA SEDA-RIVERA

RSR Realty

(787) 396-2675

ritaseda@ritaseda.com

Lic #C-3881

TOA ALTA,
PUERTO RICO

BROKER MEMBERS



GREGORY COUPE

Long Realty Inc.

(401) 447-7048

greg@longrealtyinc.com

Lic #REC.0005239

**CHEPACHET,
RHODE ISLAND**



LEANN D'ETTORE

Homistic Real Estate, Inc.

(401) 641-2014

reo_properties@yahoo.com

Lic #REB.0018324

**CRANSTON,
RHODE ISLAND**



AMANDA BELL

At Home Realty

(615) 406-9988

amandabell@realtracs.com

Lic #00260174

**ASHLAND CITY,
TENNESSEE**



JUAN BROOKS

Process Realty Services, LLC

(901) 864-4145

jbrooks30@comcast.net

Lic #272549

**MEMPHIS,
TENNESSEE**



PAMELA BOOKOUT

Coldwell Banker Realty

(817) 821-1912

pam.bookout@cbsdffw.com

Lic #0329057

**FORT WORTH,
TEXAS**

BROKER MEMBERS



MELISSA FLORES

Central Metro Realty

(210) 557-2926
melissa.reos@gmail.com
Lic #478737

HELOTES,
TEXAS



MONICA VACA

PRG REALTORS

(281) 831-4935
monica@thregroup.com
Lic #401729

HOUSTON,
TEXAS



DEREK MONTES

Montes & Associates Realty

(832) 434-4509
derekmontesrealestate@gmail.com
Lic #752899

HOUSTON,
TEXAS



RAY KING

Infinity Realty Group of Texas

(214) 418-6845
irg.rayking@gmail.com
Lic #0443318

MESQUITE,
TEXAS



MICHAEL SEETO

Seeto Realty

(214) 228-2281
dfwnewhomes@gmail.com
Lic #0496025

PLANO,
TEXAS

BROKER MEMBERS



SCOTT LARSEN

USREOP BOD, Treasurer

Revolution Realty & Management

(801) 698-2788

stlarsen21@gmail.com

Lic #5484225-PB00

**OGDEN,
UTAH**



PHIL CHERNITZER

REO Real Estate

(703) 244-2733

realhome@rcn.com

Lic #0225069101

**ANNANDALE,
VIRGINIA**



JOY LIGGAN

Virginia Capital Realty

(804) 393-6968

vacapreo@virginiacapitalrealty.com

Lic #0225225289

**RICHMOND,
VIRGINIA**



KEVIN PALL

Brooke Madison & Associates, LLC.

(757) 344-7338

kevinpall22@gmail.com

Lic #0225205551

**SUFFOLK,
VIRGINIA**



MAGGIE FRANCO

LPT Realty LLC

(206) 261-2838

maggie@hellickson.com

Lic #24132

**KENT,
WASHINGTON**

BROKER MEMBERS



AUSTIN HELLICKSON

LPT Realty LLC

(206) 940-0942

austin@hellickson.com

Lic #24023617

**PUYALLUP,
WASHINGTON**



ED LAINE

USREOP Lead Regional Rep.

eXp Realty, LLC

(206) 229-5515

ed.laine@exprealty.com

Lic #17495

**SEATTLE,
WASHINGTON**



JAMES CLIFFORD

Washington Realty Group

(253) 732-9400

jimclifford@wrgpra.com

Lic #16818

**SUMNER,
WASHINGTON**



JARYD RUFFNER

eXp Realty

(253) 686-6356

jarydruffner@gmail.com

Lic #99568

**TACOMA,
WASHINGTON**



JAMES HARRIS

Vylla Home

(262) 309-7803

reo.wisconsin@gmail.com

Lic #WI-56340-90, IL- 475211135

**MILWAUKEE,
WISCONSIN**

LAW FIRM MEMBERS



EARL WALLACE

USREOP BOD, Corp. Secretary

**Wallace, Richardson,
Sontag & Le, LLP**

(949) 690-1933

ewallace@wallacelaw.com

State BarNo.174247

**IRVINE,
CALIFORNIA**



TYLER GOLD

Tyler A. Gold, P.A.

(954)684-8675

tyler@tylergold.com

State BarNo.963992

**AVENTURA,
FLORIDA**



ROBERT SAMBURSKY

(516)659-1492

rsambursky@hhstein.com

State BarNo.3929106

**WESTBURY,
NEW YORK**

TITLE COMPANY MEMBERS



CARLOS GARCIA

Ticor Title Company

(562)897-2117

carlos.garcia@ticortitle.com

**GLENDALE,
CALIFORNIA**

PROPERTY PRESERVATION MEMBERS



ERICA STUART

C & O Services

(301)674-9877

estuart@caoservices.com

**EDGEWATER,
MARYLAND**



ROBERT EVANGELISTA

**Certified Management
& Maintenance Corp**

(347)538-3862

robert@certifiedmgt.com

**BROOKLYN,
NEW YORK**

EXECUTIVE DIRECTOR OF OPERATIONS



SHARON BARTLETT

US REO Partners

(469)919-8164

sharon.bartlett@usreop.com

**MCKINNEY,
TEXAS**



CONNECT WITH US

PARTNERSHIP. It's at the center of everything we do.



CORPORATE OFFICE

4980 North Pine Island Rd.
Sunrise, FL 33351



TOLL FREE

1-855-4-US-REOP



INQUIRIES

membership@usreop.com

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us-reo-partners](http://www.linkedin.com/company/us-reo-partners)



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