

Monthly Indicators

April 2026

U.S. existing-home sales fell 3.6% month-over-month and 1.0% year-over-year to a seasonally adjusted annual rate of 3.98 million, according to the National Association of REALTORS® (NAR), as tight supply and ongoing affordability challenges constrained activity. Sales declined month-over-month in all four regions. Year-over-year, sales increased in the South and West but fell in the Midwest and Northeast.

Closed Sales decreased 3.5 percent for Detached homes and 1.6 percent for Attached homes. Pending Sales increased 6.7 percent for Detached homes and 13.8 percent for Attached homes. Inventory decreased 22.4 percent for Detached homes but increased 1.1 percent for Attached homes.

Median Sales Price increased 2.3 percent to \$1,100,000 for Detached homes and 1.5 percent to \$680,000 for Attached homes. Days on Market increased 9.4 percent for Detached homes and 24.2 percent for Attached homes. Months Supply of Inventory decreased 23.3 percent for Detached homes and 2.7 percent for Attached homes.

Nationally, the median existing-home price rose 1.4% from a year earlier to \$408,800, marking the 33rd consecutive month of year-over-year price increases as limited inventory continued to put upward pressure on prices, NAR said. There were 1.36 million homes for sale heading into April, up 2.3% from a year earlier, representing a 4.1-month supply at the current sales pace.

Monthly Snapshot

- 2.9%

One-Year Change in
Closed Sales
All Properties

+ 1.7%

One-Year Change in
Median Sales Price
All Properties

- 12.8%

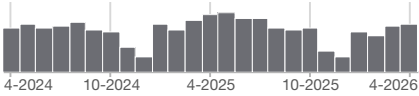
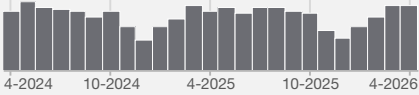
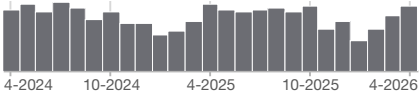
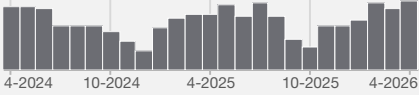
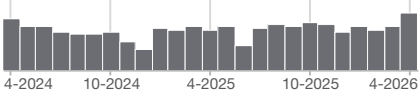
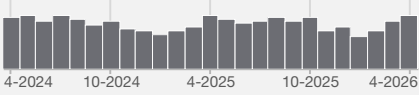
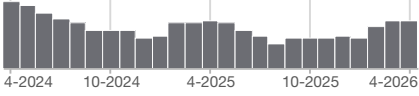

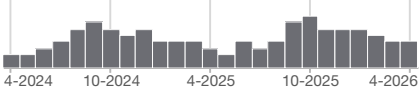

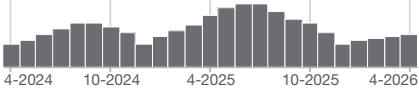
One-Year Change in
Homes for Sale
All Properties

Residential real estate activity in San Diego County composed of single family properties, townhomes and condominiums. Percent changes are calculated using rounded figures.

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Detached Market Overview

Key metrics by report month and for year-to-date (YTD) starting from the first of the year. **Detached homes only.**

Key Metrics	Historical Sparkbars	4-2025	4-2026	% Change	YTD 2025	YTD 2026	% Change
New Listings		2,340	1,994	- 14.8%	8,355	7,380	- 11.7%
Pending Sales		1,311	1,399	+ 6.7%	4,952	5,090	+ 2.8%
Closed Sales		1,437	1,386	- 3.5%	4,568	4,553	- 0.3%
Median Sales Price		\$1,075,000	\$1,100,000	+ 2.3%	\$1,060,000	\$1,089,000	+ 2.7%
Average Sales Price		\$1,409,330	\$1,494,712	+ 6.1%	\$1,411,831	\$1,441,936	+ 2.1%
\$ Volume of Closed Sales (in millions)		\$2,024	\$2,067	+ 2.1%	\$6,435	\$6,554	+ 1.8%
Pct. of Orig. Price Received		98.8%	98.9%	+ 0.1%	98.5%	98.4%	- 0.1%
Days on Market Until Sale		32	35	+ 9.4%	36	39	+ 8.3%
Housing Affordability Index		39	40	+ 2.6%	40	41	+ 2.5%
Inventory of Homes for Sale		3,658	2,838	- 22.4%	—	—	—
Months Supply of Inventory		3.0	2.3	- 23.3%	—	—	—

Attached Market Overview

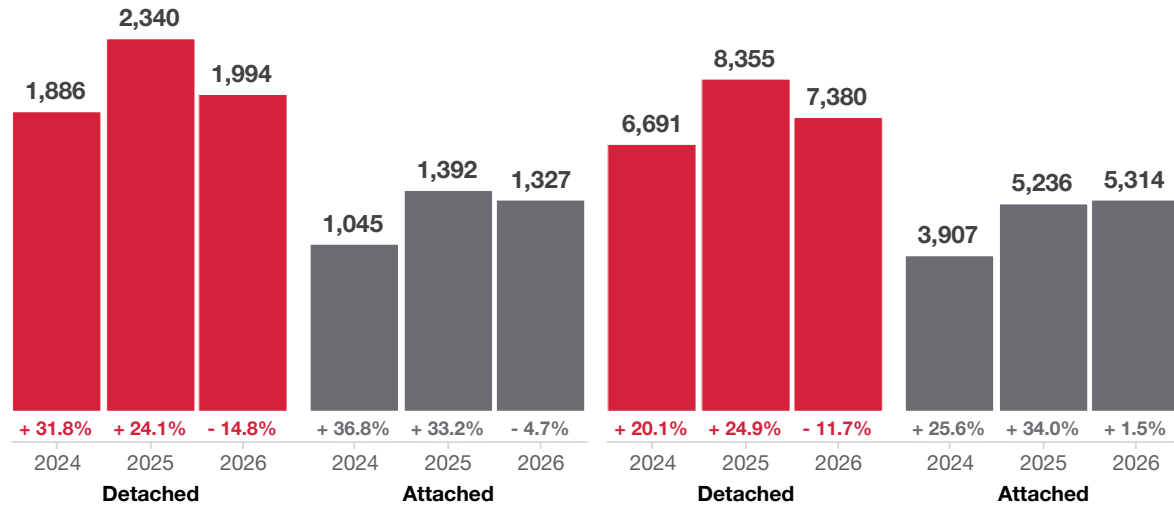
Key metrics by report month and for year-to-date (YTD) starting from the first of the year. **Attached homes only.**

Key Metrics	Historical Sparkbars	4-2025	4-2026	% Change	YTD 2025	YTD 2026	% Change
New Listings		1,392	1,327	- 4.7%	5,236	5,314	+ 1.5%
Pending Sales		703	800	+ 13.8%	2,764	2,984	+ 8.0%
Closed Sales		768	756	- 1.6%	2,589	2,617	+ 1.1%
Median Sales Price		\$670,000	\$680,000	+ 1.5%	\$675,000	\$659,000	- 2.4%
Average Sales Price		\$833,770	\$823,844	- 1.2%	\$816,054	\$795,304	- 2.5%
\$ Volume of Closed Sales (in millions)		\$638	\$617	- 3.3%	\$2,104	\$2,073	- 1.5%
Pct. of Orig. Price Received		98.5%	97.9%	- 0.6%	98.4%	97.8%	- 0.6%
Days on Market Until Sale		33	41	+ 24.2%	40	46	+ 15.0%
Housing Affordability Index		63	65	+ 3.2%	63	67	+ 6.3%
Inventory of Homes for Sale		2,527	2,554	+ 1.1%	—	—	—
Months Supply of Inventory		3.7	3.6	- 2.7%	—	—	—

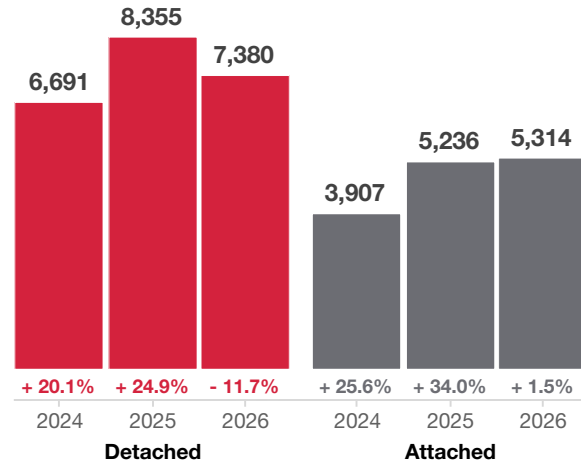
New Listings

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

April

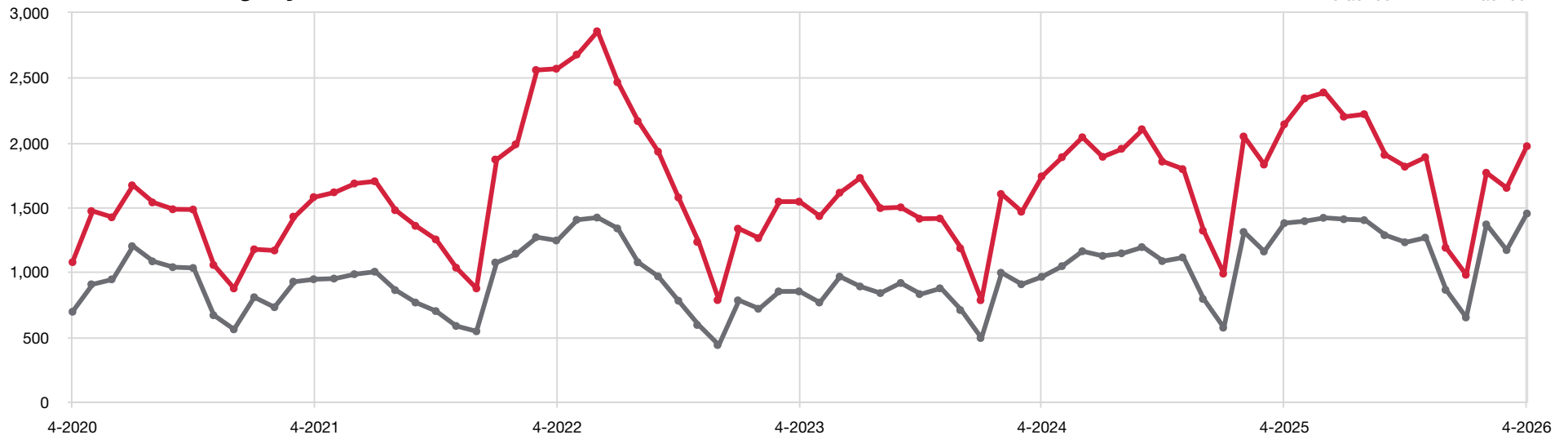


Year to Date



New Listings	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
May-2025	2,386	+ 17.0%	1,418	+ 22.2%
Jun-2025	2,199	+ 16.4%	1,407	+ 25.2%
Jul-2025	2,218	+ 13.7%	1,400	+ 22.4%
Aug-2025	1,904	- 9.4%	1,284	+ 7.7%
Sep-2025	1,813	- 2.1%	1,229	+ 13.4%
Oct-2025	1,886	+ 5.1%	1,265	+ 13.8%
Nov-2025	1,187	- 10.0%	862	+ 8.8%
Dec-2025	978	- 0.9%	649	+ 13.9%
Jan-2026	1,766	- 13.7%	1,367	+ 4.4%
Feb-2026	1,649	- 9.8%	1,169	+ 0.9%
Mar-2026	1,971	- 7.9%	1,451	+ 5.4%
Apr-2026	1,994	- 14.8%	1,327	- 4.7%
12-Month Avg	1,829	- 1.5%	1,236	+ 10.5%

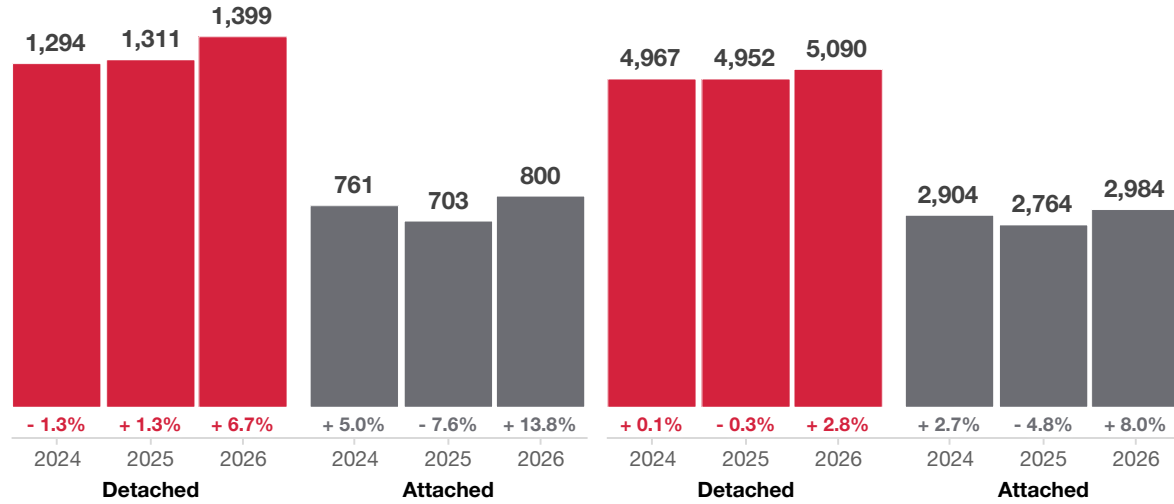
Historical New Listings by Month



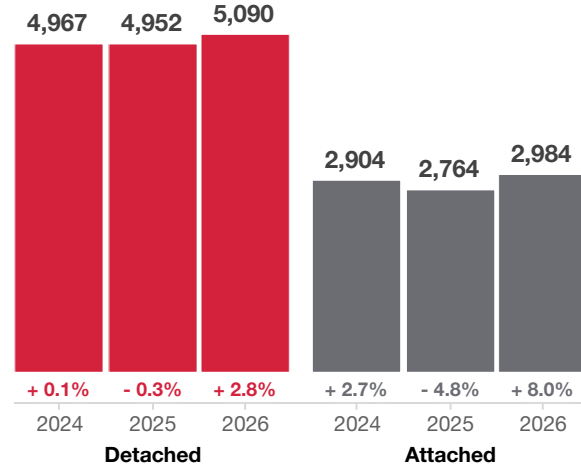
Pending Sales

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

April

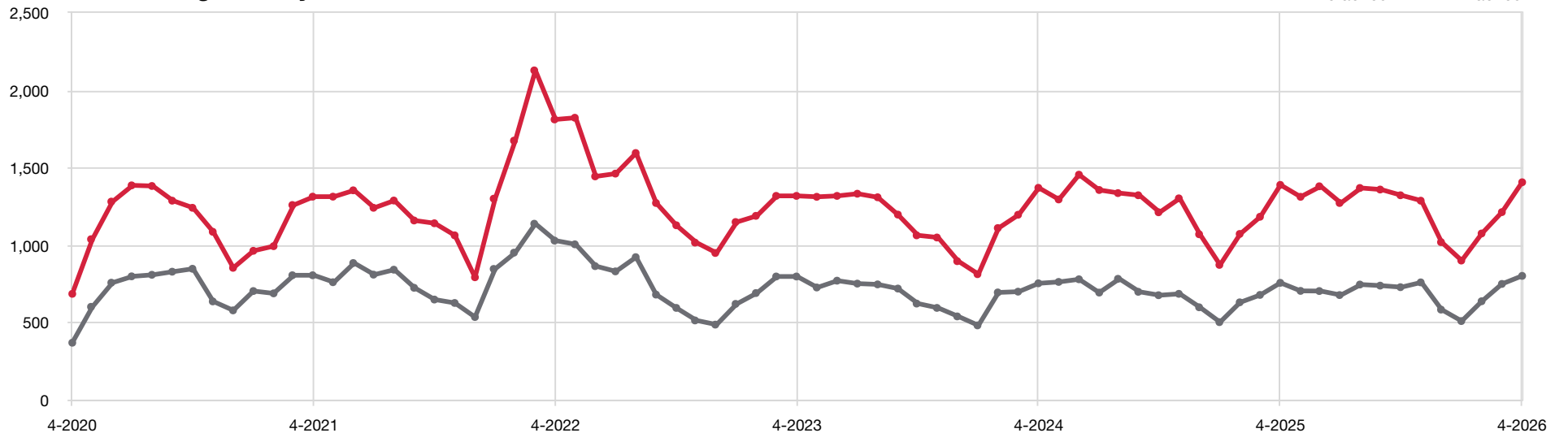


Year to Date



Pending Sales	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
May-2025	1,379	- 5.2%	702	- 9.8%
Jun-2025	1,271	- 6.2%	676	- 2.3%
Jul-2025	1,368	+ 2.5%	744	- 4.7%
Aug-2025	1,358	+ 2.8%	737	+ 5.7%
Sep-2025	1,321	+ 9.1%	727	+ 7.7%
Oct-2025	1,286	- 1.2%	758	+ 10.8%
Nov-2025	1,018	- 4.8%	582	- 2.5%
Dec-2025	899	+ 3.2%	508	+ 1.4%
Jan-2026	1,074	+ 0.3%	636	+ 1.1%
Feb-2026	1,212	+ 2.5%	748	+ 10.5%
Mar-2026	1,405	+ 1.2%	800	+ 6.0%
Apr-2026	1,399	+ 6.7%	800	+ 13.8%
12-Month Avg	1,249	+ 0.8%	702	+ 3.0%

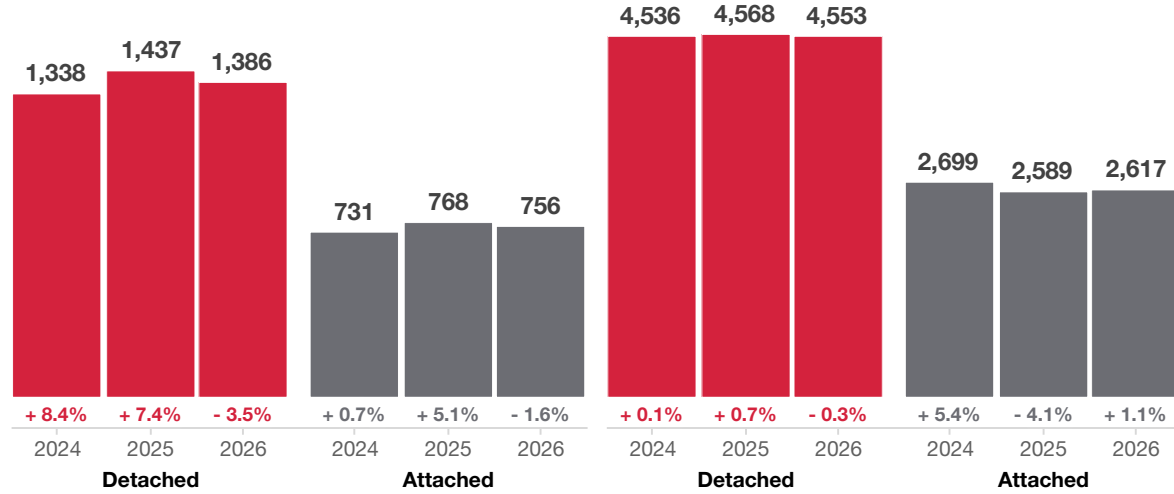
Historical Pending Sales by Month



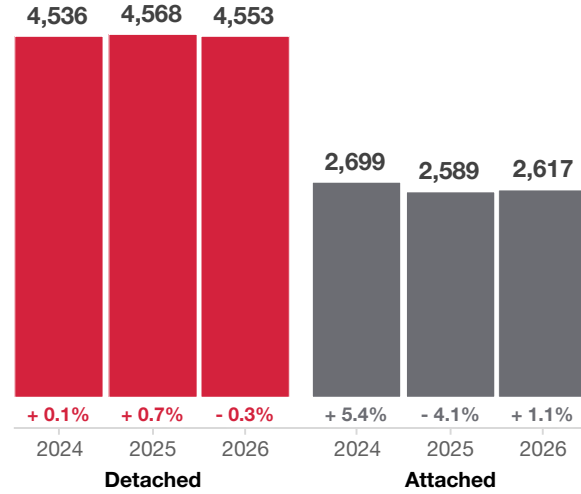
Closed Sales

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

April

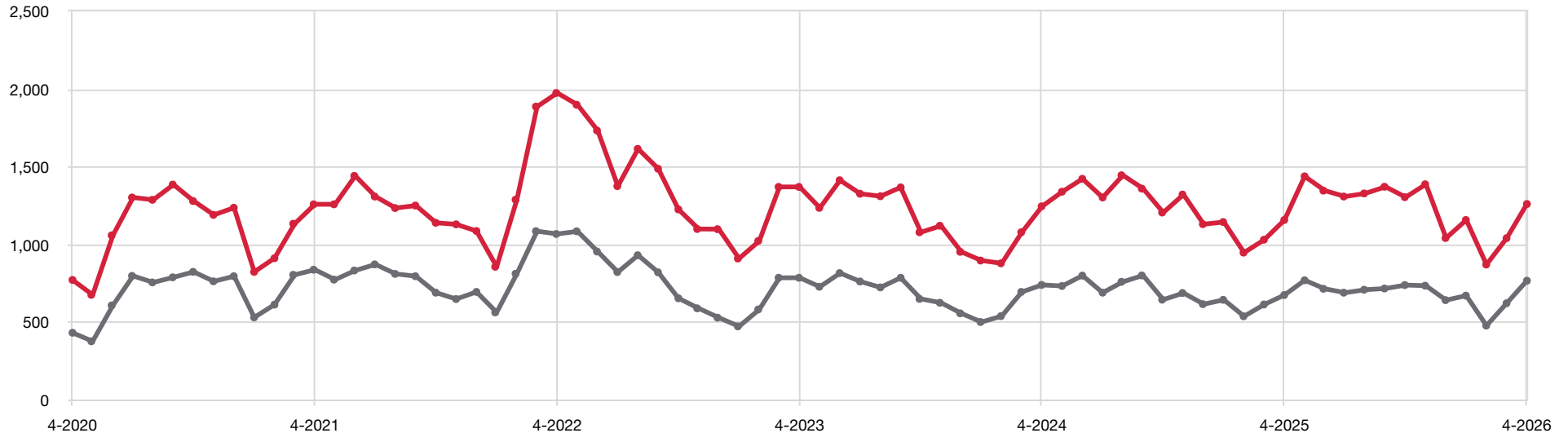


Year to Date



Closed Sales	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
May-2025	1,345	- 5.3%	713	- 10.7%
Jun-2025	1,307	+ 0.5%	688	0.0%
Jul-2025	1,327	- 8.1%	707	- 6.7%
Aug-2025	1,370	+ 0.9%	715	- 10.5%
Sep-2025	1,303	+ 8.2%	737	+ 14.6%
Oct-2025	1,386	+ 5.0%	733	+ 6.9%
Nov-2025	1,040	- 7.9%	640	+ 4.2%
Dec-2025	1,156	+ 1.1%	669	+ 4.2%
Jan-2026	869	- 8.1%	476	- 11.2%
Feb-2026	1,039	+ 1.0%	620	+ 1.3%
Mar-2026	1,259	+ 8.9%	765	+ 13.7%
Apr-2026	1,386	- 3.5%	756	- 1.6%
12-Month Avg	1,232	- 0.7%	685	+ 0.0%

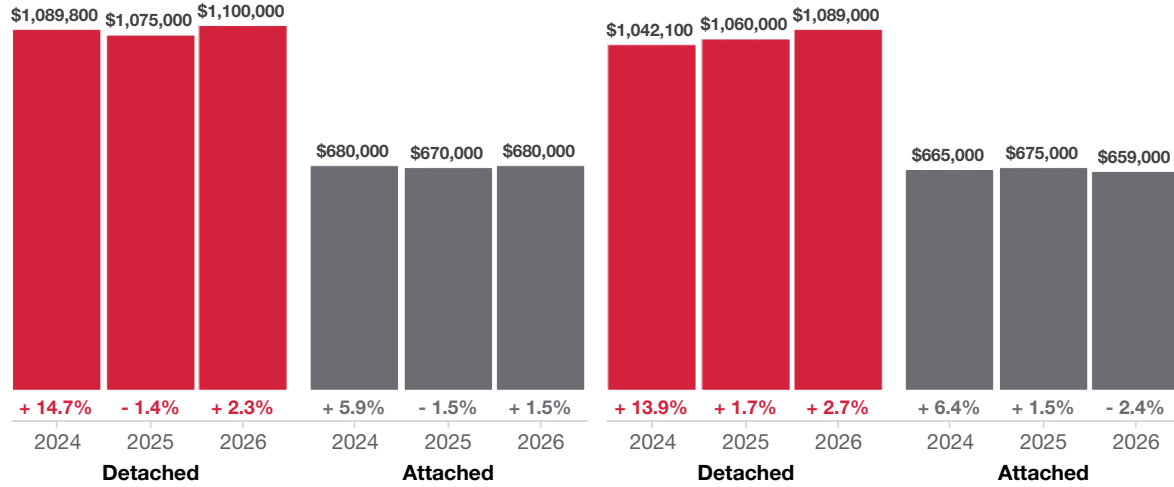
Historical Closed Sales by Month



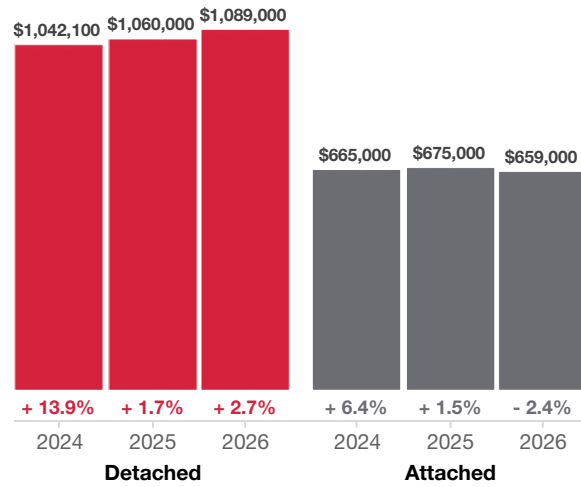
Median Sales Price

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

April



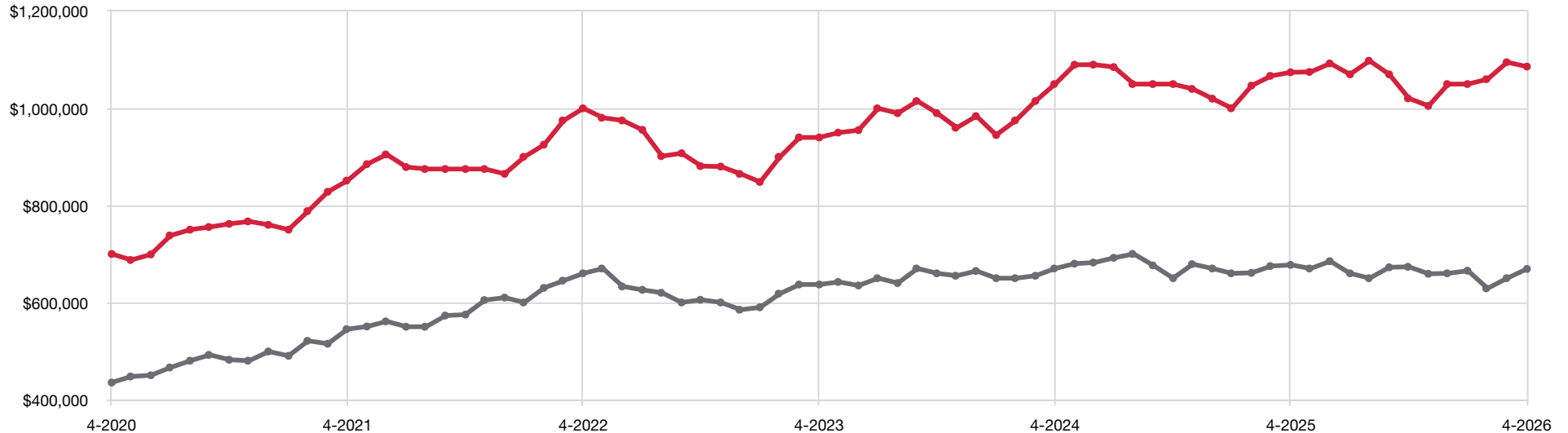
Year to Date



Median Sales Price	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
May-2025	\$1,092,500	+ 0.2%	\$685,000	+ 0.4%
Jun-2025	\$1,070,000	- 1.4%	\$660,000	- 4.6%
Jul-2025	\$1,098,000	+ 4.6%	\$650,000	- 7.1%
Aug-2025	\$1,070,000	+ 1.9%	\$672,450	- 0.6%
Sep-2025	\$1,020,500	- 2.8%	\$673,500	+ 3.6%
Oct-2025	\$1,005,000	- 3.4%	\$659,000	- 2.9%
Nov-2025	\$1,050,000	+ 2.9%	\$660,000	- 1.5%
Dec-2025	\$1,050,000	+ 5.0%	\$665,500	+ 0.8%
Jan-2026	\$1,060,000	+ 1.3%	\$629,000	- 4.8%
Feb-2026	\$1,095,000	+ 2.6%	\$650,000	- 3.7%
Mar-2026	\$1,086,000	+ 1.1%	\$669,000	- 1.2%
Apr-2026	\$1,100,000	+ 2.3%	\$680,000	+ 1.5%
12-Month Avg*	\$1,060,500	+ 1.0%	\$661,200	- 2.0%

* Median Sales Price for all properties from May 2025 through April 2026. This is not the average of the individual figures above.

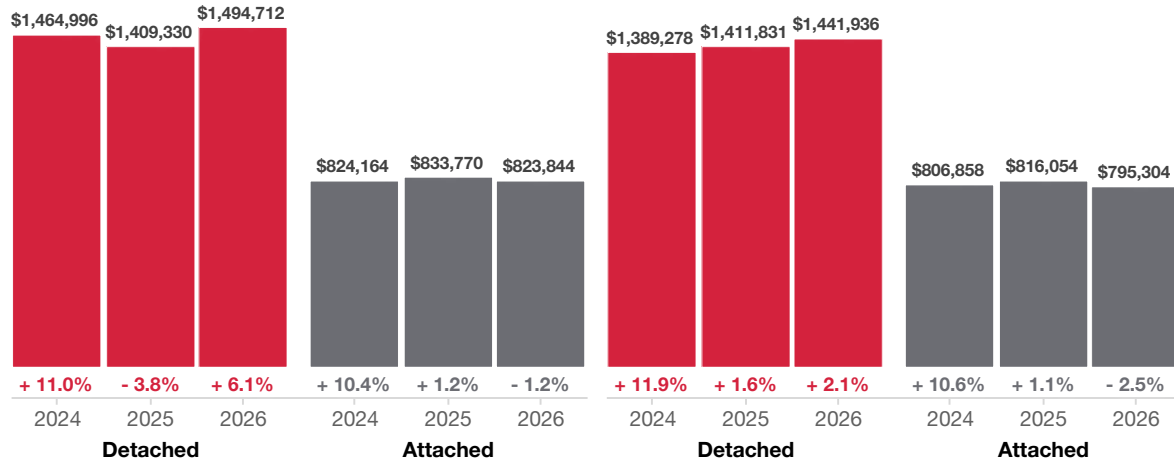
Historical Median Sales Price by Month



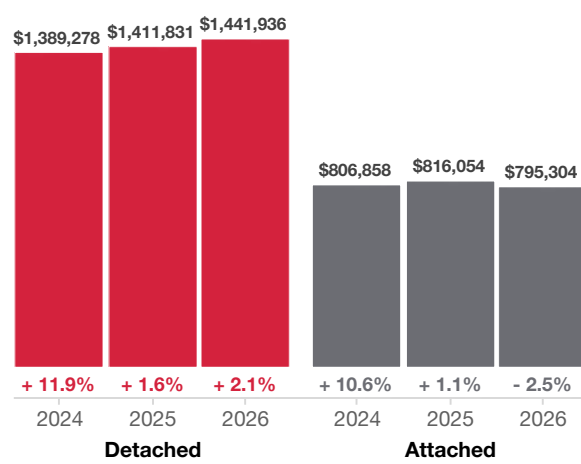
Average Sales Price

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

April



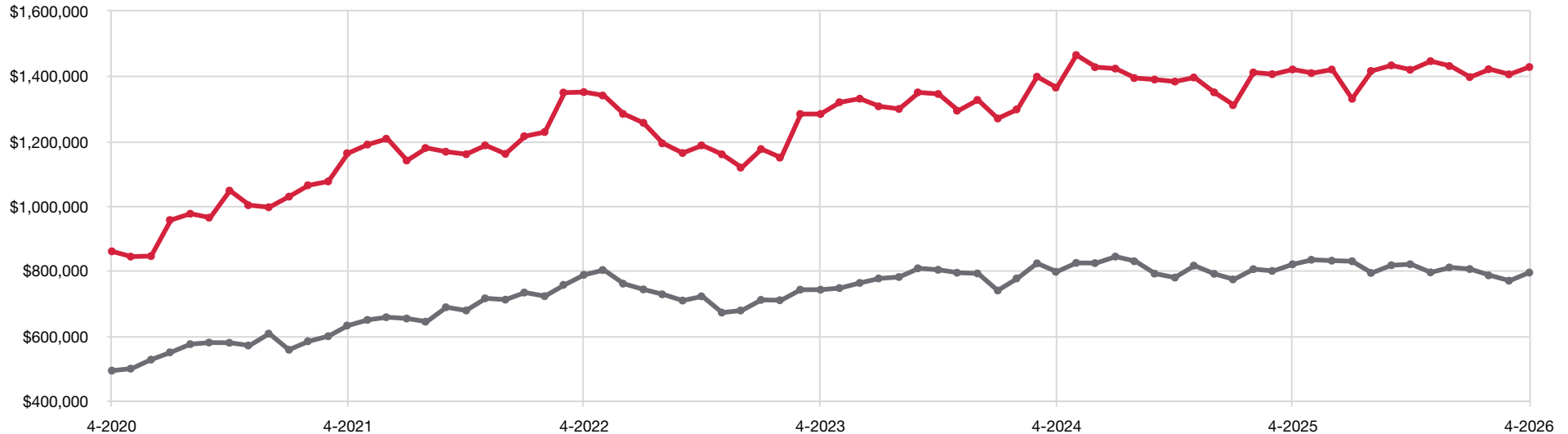
Year to Date



Avg. Sales Price	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
May-2025	\$1,420,359	- 0.5%	\$831,077	+ 0.9%
Jun-2025	\$1,330,058	- 6.5%	\$829,263	- 1.7%
Jul-2025	\$1,415,961	+ 1.6%	\$793,165	- 4.3%
Aug-2025	\$1,433,201	+ 3.1%	\$816,922	+ 3.3%
Sep-2025	\$1,419,579	+ 2.6%	\$820,009	+ 5.3%
Oct-2025	\$1,446,225	+ 3.6%	\$794,926	- 2.6%
Nov-2025	\$1,431,195	+ 6.0%	\$810,192	+ 2.5%
Dec-2025	\$1,397,002	+ 6.6%	\$805,221	+ 4.1%
Jan-2026	\$1,421,323	+ 0.7%	\$785,812	- 2.4%
Feb-2026	\$1,405,565	- 0.0%	\$769,229	- 3.8%
Mar-2026	\$1,428,109	+ 0.5%	\$794,329	- 3.1%
Apr-2026	\$1,494,712	+ 6.1%	\$823,844	- 1.2%
12-Month Avg*	\$1,421,126	+ 1.9%	\$807,116	- 0.3%

* Avg. Sales Price for all properties from May 2025 through April 2026. This is not the average of the individual figures above.

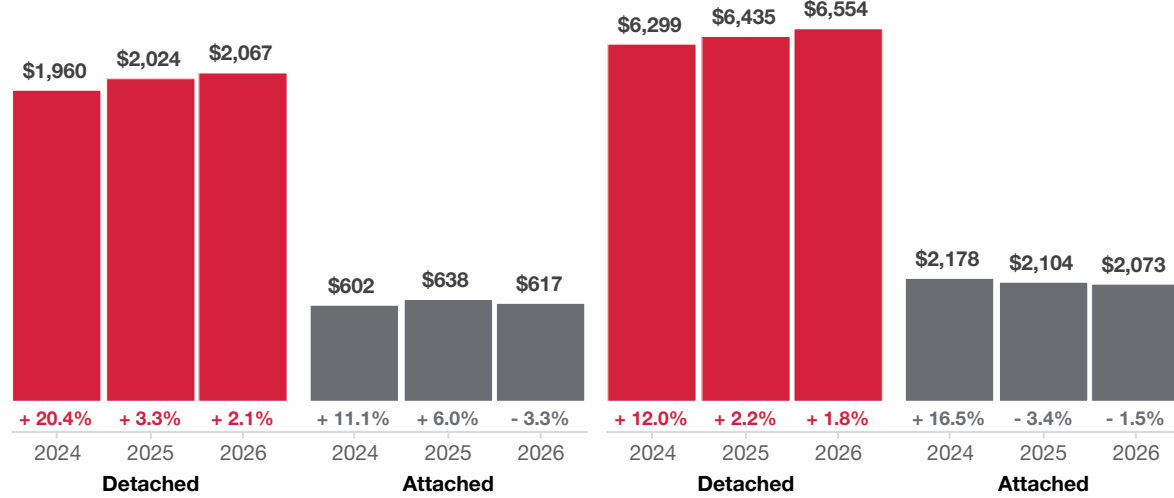
Historical Average Sales Price by Month



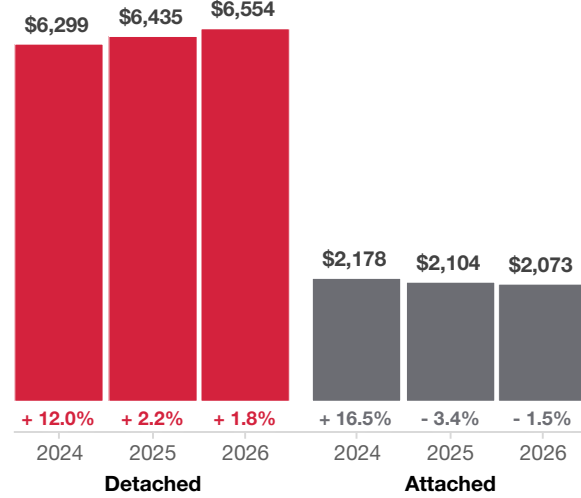
Dollar Volume of Closed Sales (in millions)

The total dollar volume for all closed sales in a given month (in millions). Does not account for seller concessions.

April

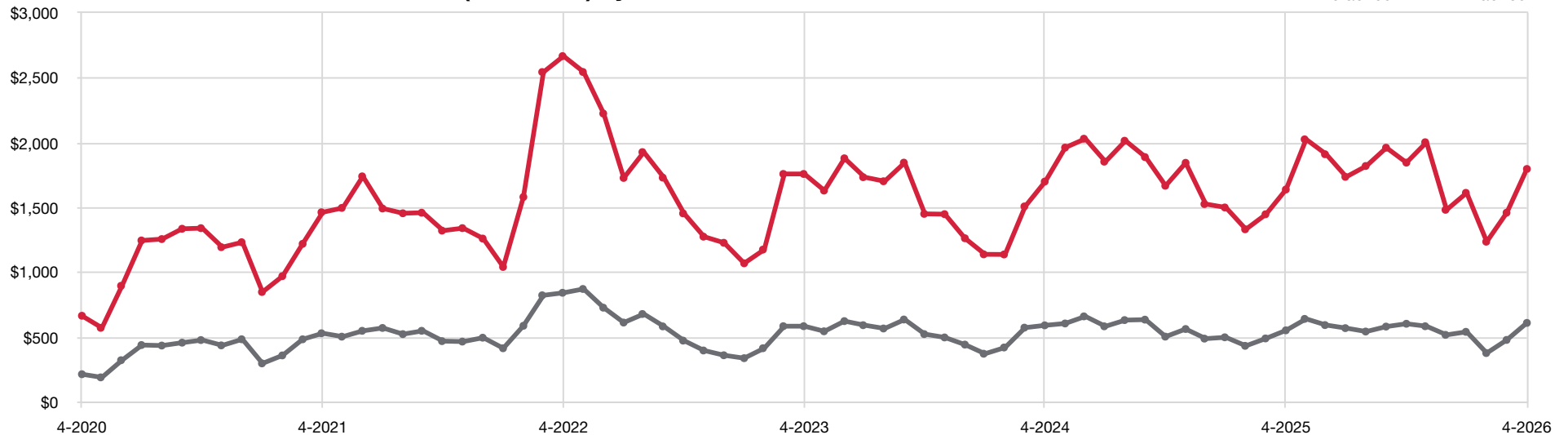


Year to Date



\$ Volume of Closed Sales (in millions)	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
May-2025	\$1,909	- 5.9%	\$590	- 10.2%
Jun-2025	\$1,734	- 6.4%	\$566	- 2.4%
Jul-2025	\$1,818	- 9.7%	\$540	- 14.1%
Aug-2025	\$1,959	+ 3.8%	\$578	- 8.5%
Sep-2025	\$1,844	+ 10.7%	\$600	+ 19.8%
Oct-2025	\$2,002	+ 8.6%	\$581	+ 3.8%
Nov-2025	\$1,480	- 2.9%	\$514	+ 6.0%
Dec-2025	\$1,611	+ 7.5%	\$538	+ 8.5%
Jan-2026	\$1,234	- 7.1%	\$374	- 13.0%
Feb-2026	\$1,458	+ 0.9%	\$475	- 2.5%
Mar-2026	\$1,795	+ 9.7%	\$607	+ 10.6%
Apr-2026	\$2,067	+ 2.1%	\$617	- 3.3%
12-Month Avg	\$1,743	+ 0.8%	\$549	- 0.9%

Historical Dollar Volume of Closed Sales (in millions) by Month

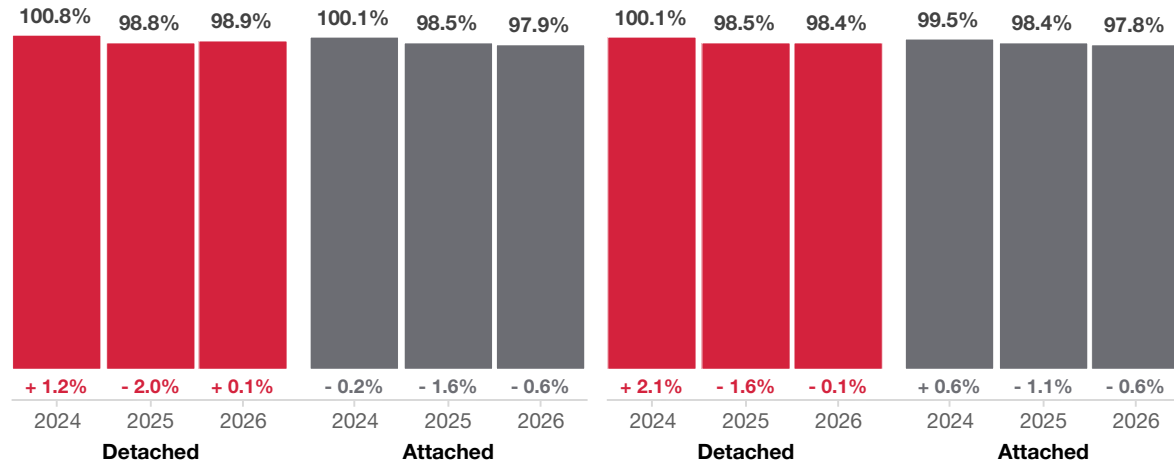


Percent of Original List Price Received

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

April

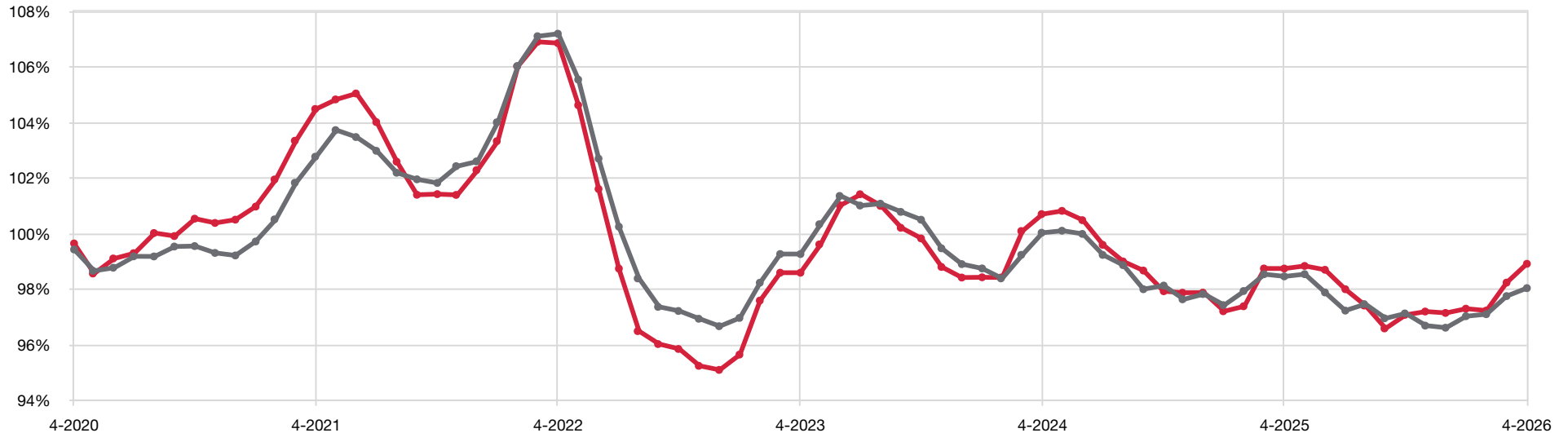
Year to Date



Pct. of Orig. Price Received	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
May-2025	98.7%	- 1.8%	97.9%	- 2.1%
Jun-2025	98.0%	- 1.6%	97.2%	- 2.0%
Jul-2025	97.4%	- 1.6%	97.4%	- 1.4%
Aug-2025	96.6%	- 2.1%	96.9%	- 1.1%
Sep-2025	97.1%	- 0.8%	97.1%	- 1.0%
Oct-2025	97.2%	- 0.7%	96.7%	- 0.9%
Nov-2025	97.1%	- 0.8%	96.6%	- 1.2%
Dec-2025	97.3%	+ 0.1%	97.0%	- 0.4%
Jan-2026	97.2%	- 0.2%	97.1%	- 0.8%
Feb-2026	98.2%	- 0.5%	97.7%	- 0.8%
Mar-2026	98.9%	+ 0.2%	98.0%	- 0.4%
Apr-2026	98.9%	+ 0.1%	97.9%	- 0.6%
12-Month Avg*	97.7%	- 0.9%	97.3%	- 1.1%

* Pct. of Orig. Price Received for all properties from May 2025 through April 2026. This is not the average of the individual figures above.

Historical Percent of Original List Price Received by Month

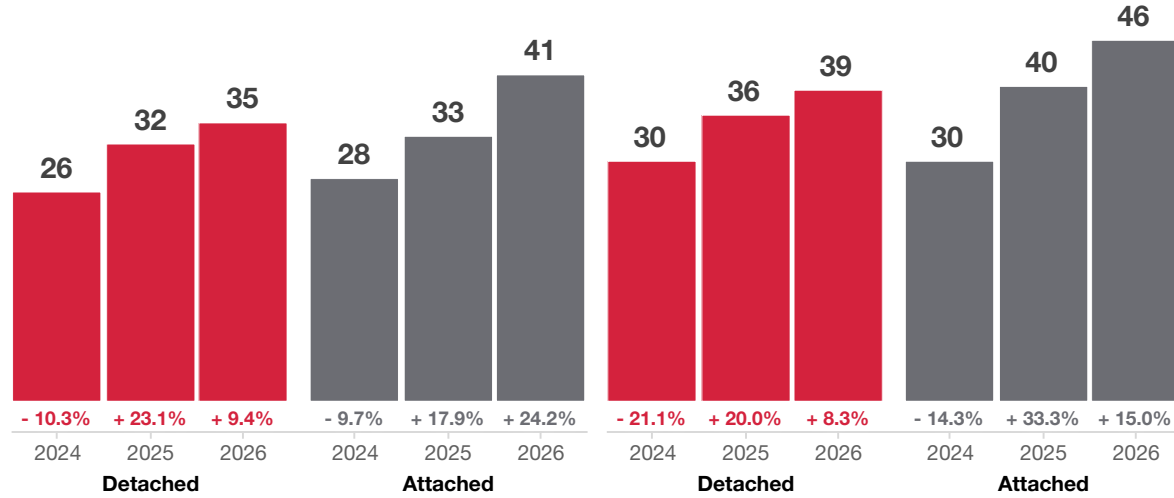


Days on Market Until Sale

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

April

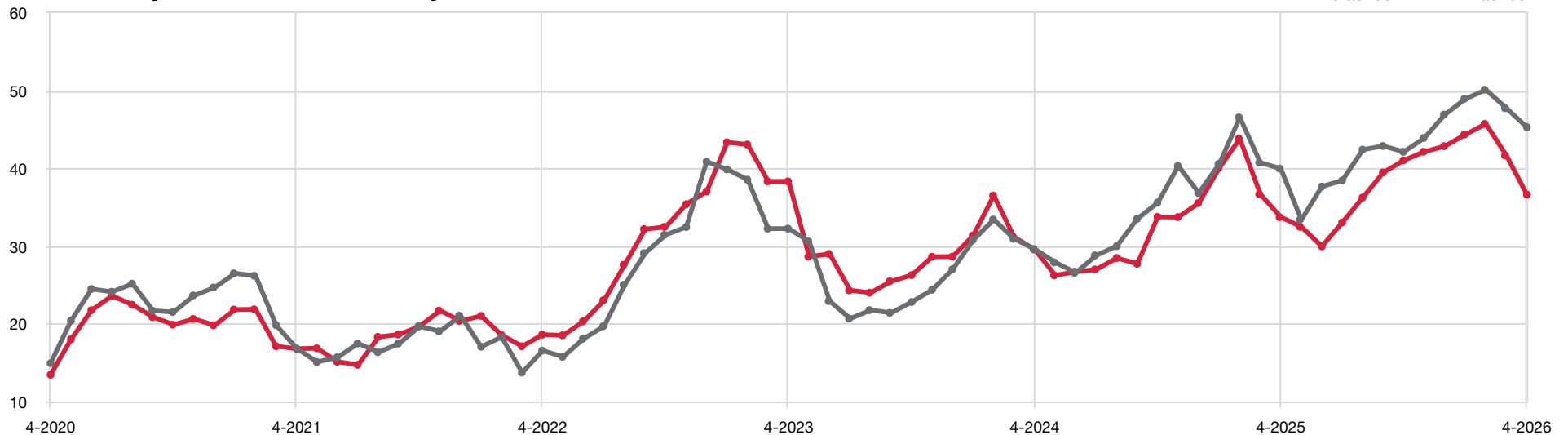
Year to Date



Days on Market	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
May-2025	30	+ 11.1%	38	+ 40.7%
Jun-2025	33	+ 22.2%	38	+ 31.0%
Jul-2025	36	+ 28.6%	42	+ 40.0%
Aug-2025	39	+ 39.3%	43	+ 26.5%
Sep-2025	41	+ 20.6%	42	+ 16.7%
Oct-2025	42	+ 23.5%	44	+ 10.0%
Nov-2025	43	+ 19.4%	47	+ 27.0%
Dec-2025	44	+ 10.0%	49	+ 19.5%
Jan-2026	46	+ 4.5%	50	+ 6.4%
Feb-2026	42	+ 13.5%	48	+ 17.1%
Mar-2026	37	+ 8.8%	45	+ 12.5%
Apr-2026	35	+ 9.4%	41	+ 24.2%
12-Month Avg*	39	+ 17.9%	44	+ 22.9%

* Days on Market for all properties from May 2025 through April 2026. This is not the average of the individual figures above.

Historical Days on Market Until Sale by Month

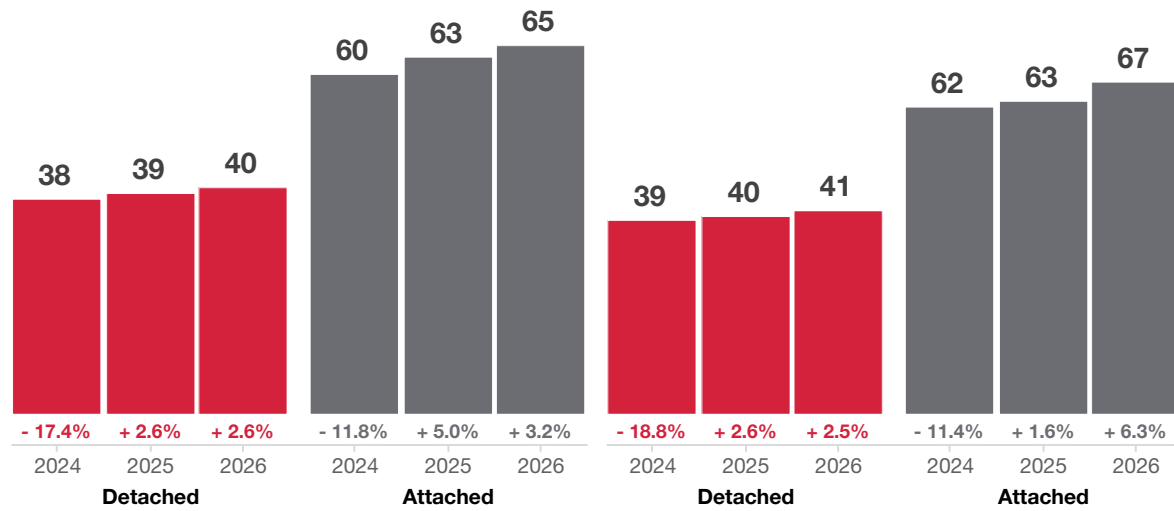


Housing Affordability Index

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

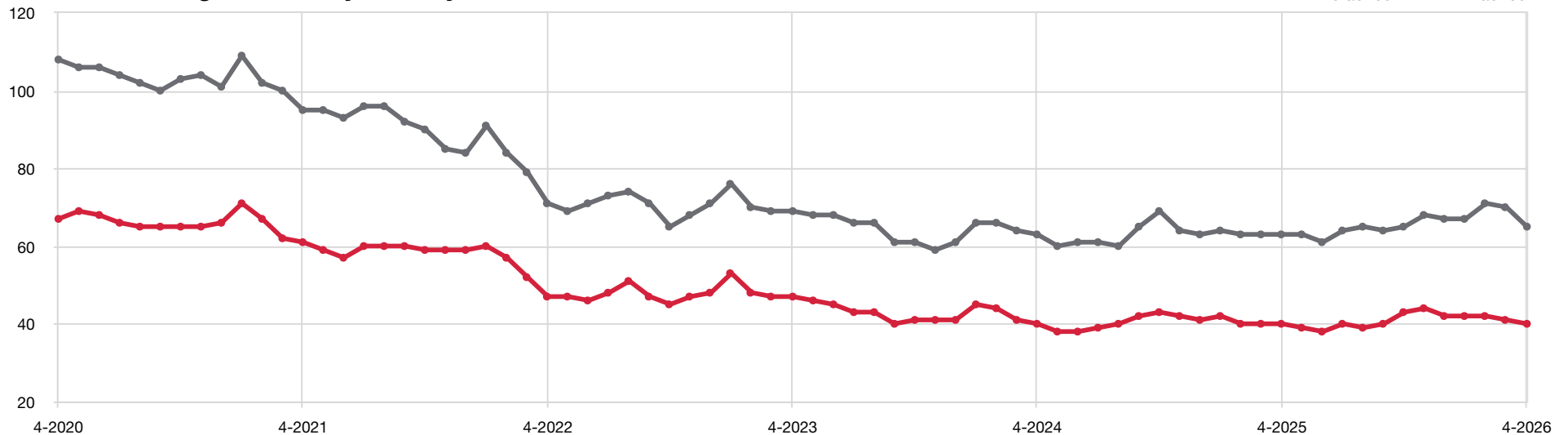
April

Year to Date



Affordability Index	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
May-2025	38	0.0%	61	0.0%
Jun-2025	40	+ 2.6%	64	+ 4.9%
Jul-2025	39	- 2.5%	65	+ 8.3%
Aug-2025	40	- 4.8%	64	- 1.5%
Sep-2025	43	0.0%	65	- 5.8%
Oct-2025	44	+ 4.8%	68	+ 6.3%
Nov-2025	42	+ 2.4%	67	+ 6.3%
Dec-2025	42	0.0%	67	+ 4.7%
Jan-2026	42	+ 5.0%	71	+ 12.7%
Feb-2026	41	+ 2.5%	70	+ 11.1%
Mar-2026	40	0.0%	65	+ 3.2%
Apr-2026	40	+ 2.6%	65	+ 3.2%
12-Month Avg	41	+ 1.0%	66	+ 4.3%

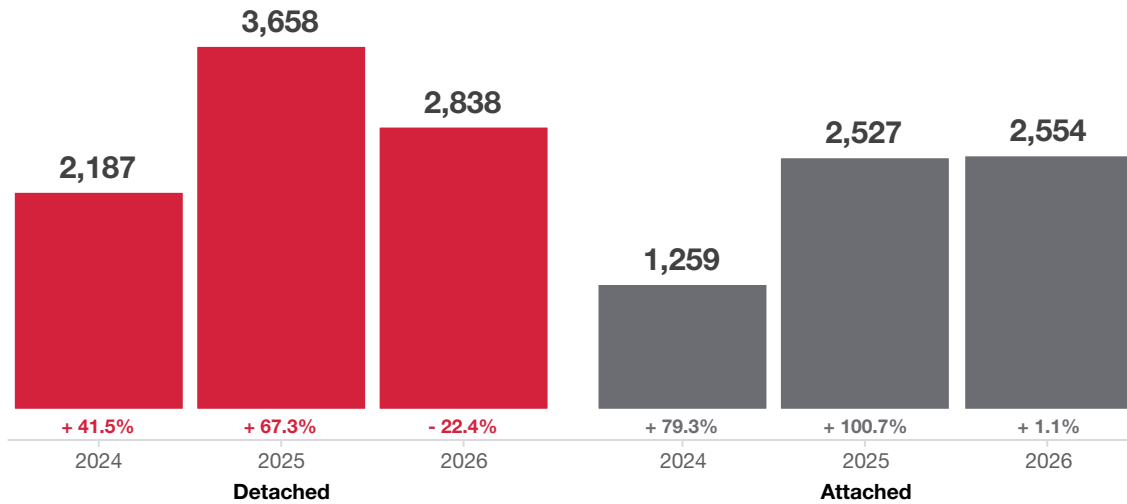
Historical Housing Affordability Index by Month



Inventory of Homes for Sale

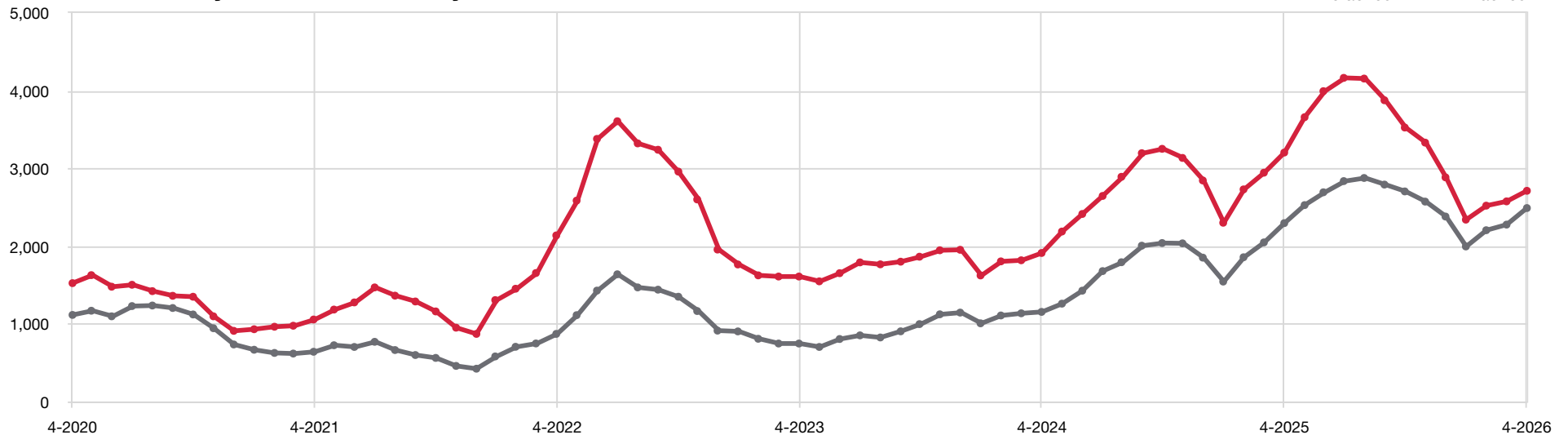
The number of properties available for sale in active status at the end of a given month.

April



Homes for Sale	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
May-2025	3,993	+ 65.5%	2,692	+ 88.8%
Jun-2025	4,164	+ 57.4%	2,836	+ 69.0%
Jul-2025	4,155	+ 43.7%	2,876	+ 60.5%
Aug-2025	3,876	+ 21.3%	2,791	+ 39.2%
Sep-2025	3,525	+ 8.4%	2,703	+ 32.6%
Oct-2025	3,331	+ 6.3%	2,572	+ 26.4%
Nov-2025	2,884	+ 1.4%	2,380	+ 28.6%
Dec-2025	2,340	+ 1.7%	1,995	+ 29.3%
Jan-2026	2,520	- 7.7%	2,204	+ 18.8%
Feb-2026	2,575	- 12.5%	2,276	+ 11.2%
Mar-2026	2,711	- 15.4%	2,489	+ 8.5%
Apr-2026	2,838	- 22.4%	2,554	+ 1.1%
12-Month Avg	3,243	+ 10.5%	2,531	+ 31.5%

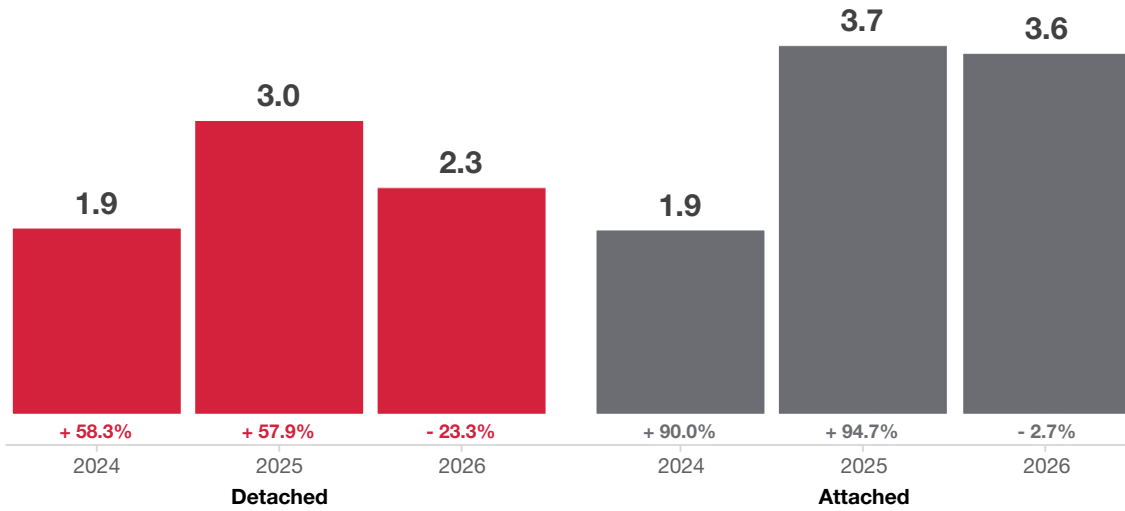
Historical Inventory of Homes for Sale by Month



Months Supply of Inventory

The inventory of homes for sale at the end of a given month, divided by the average monthly pending sales from the last 12 months.

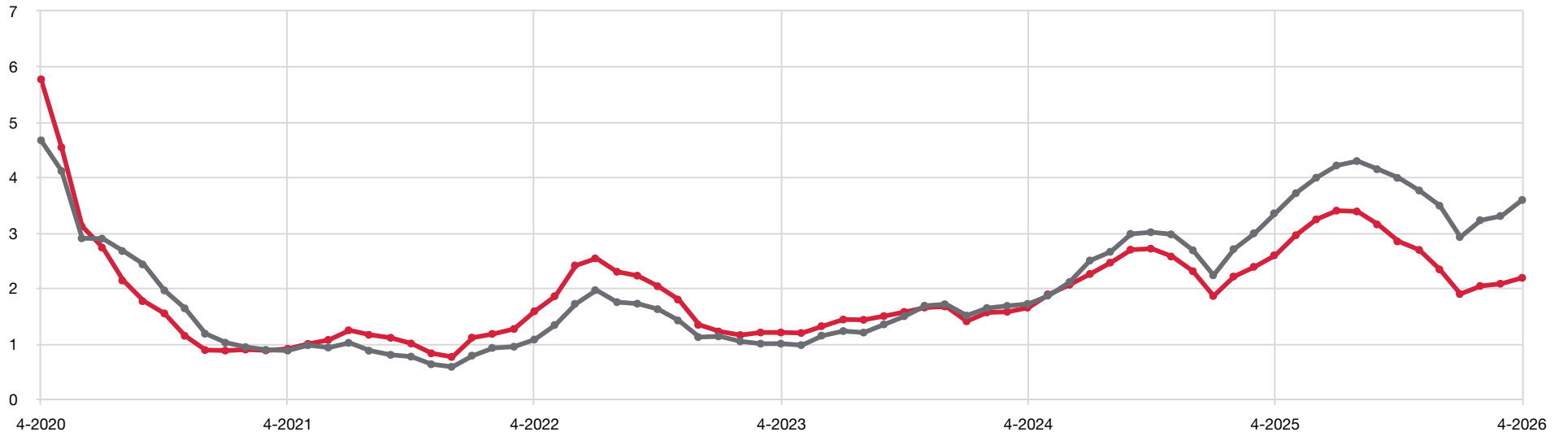
April



Months Supply	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
May-2025	3.2	+ 52.4%	4.0	+ 90.5%
Jun-2025	3.4	+ 47.8%	4.2	+ 68.0%
Jul-2025	3.4	+ 36.0%	4.3	+ 59.3%
Aug-2025	3.1	+ 14.8%	4.1	+ 36.7%
Sep-2025	2.8	+ 3.7%	4.0	+ 33.3%
Oct-2025	2.7	+ 3.8%	3.8	+ 26.7%
Nov-2025	2.3	0.0%	3.5	+ 29.6%
Dec-2025	1.9	0.0%	2.9	+ 31.8%
Jan-2026	2.0	- 9.1%	3.2	+ 18.5%
Feb-2026	2.1	- 12.5%	3.3	+ 10.0%
Mar-2026	2.2	- 15.4%	3.6	+ 9.1%
Apr-2026	2.3	- 23.3%	3.6	- 2.7%
12-Month Avg*	2.6	+ 8.5%	3.7	+ 31.6%

* Months Supply for all properties from May 2025 through April 2026. This is not the average of the individual figures above.

Historical Months Supply of Inventory by Month



Total Market Overview

Key metrics by report month and for year-to-date (YTD) starting from the first of the year.

Key Metrics	Historical Sparkbars	4-2025	4-2026	% Change	YTD 2025	YTD 2026	% Change
New Listings		3,732	3,321	- 11.0%	13,591	12,694	- 6.6%
Pending Sales		2,014	2,199	+ 9.2%	7,716	8,074	+ 4.6%
Closed Sales		2,205	2,142	- 2.9%	7,157	7,170	+ 0.2%
Median Sales Price		\$910,000	\$925,500	+ 1.7%	\$900,000	\$905,000	+ 0.6%
Average Sales Price		\$1,209,283	\$1,259,027	+ 4.1%	\$1,196,597	\$1,206,230	+ 0.8%
\$ Volume of Closed Sales (in millions)		\$2,662	\$2,684	+ 0.8%	\$8,539	\$8,627	+ 1.0%
Pct. of Orig. Price Received		98.7%	98.5%	- 0.2%	98.4%	98.2%	- 0.2%
Days on Market Until Sale		33	37	+ 12.1%	37	41	+ 10.8%
Housing Affordability Index		46	48	+ 4.3%	47	49	+ 4.3%
Inventory of Homes for Sale		6,185	5,392	- 12.8%	—	—	—
Months Supply of Inventory		3.2	2.8	- 12.5%	—	—	—