

Monthly Indicators

June 2026

U.S. existing-home sales rose 3.2% month-over-month and year-over-year to a seasonally adjusted annual rate of 4.17 million units, the National Association of REALTORS® (NAR) reported, marking the highest level since December 2025. Regionally, sales increased from the previous month in the Northeast, Midwest, and South, while remaining flat in the West. On a year-over-year basis, sales grew in the Midwest, South, and West but declined in the Northeast.

Closed Sales increased 10.9 percent for Detached homes and 6.7 percent for Attached homes. Pending Sales increased 4.6 percent for Detached homes and 13.7 percent for Attached homes. Inventory decreased 26.1 percent for Detached homes but increased 0.5 percent for Attached homes.

Median Sales Price increased 5.1 percent to \$1,125,000 for Detached homes and 1.1 percent to \$670,000 for Attached homes. Days on Market decreased 3.0 percent for Detached homes but increased 10.3 percent for Attached homes. Months Supply of Inventory decreased 29.4 percent for Detached homes and 4.8 percent for Attached homes.

Nationally, there were 1.55 million homes available for sale heading into June, a 3.3% increase from the previous month and 0.6% higher than one year earlier, representing a 4.5-month supply at the current sales pace, according to NAR. Home prices also rose, with the median existing-home price climbing to \$429,300 nationwide, an all-time high for the month and 1.3% higher than a year earlier.

Monthly Snapshot

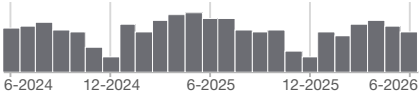
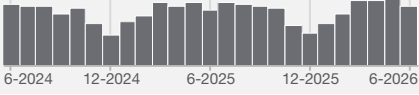




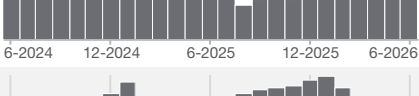
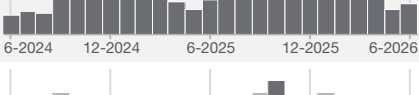

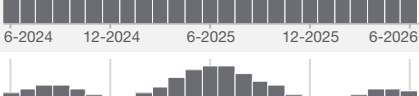

+ 9.5%	+ 4.4%	- 15.3%
One-Year Change in Closed Sales All Properties	One-Year Change in Median Sales Price All Properties	One-Year Change in Homes for Sale All Properties

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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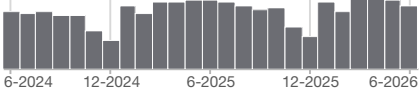

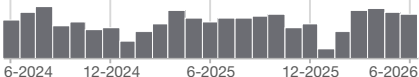

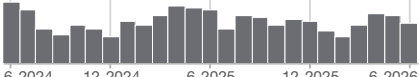

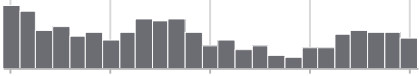

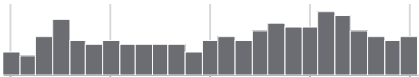

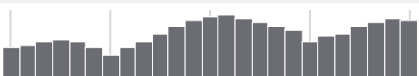
Detached Market Overview

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	6-2025	6-2026	% Change	YTD 2025	YTD 2026	% Change
New Listings		2,177	1,789	- 17.8%	12,800	11,312	- 11.6%
Pending Sales		1,258	1,316	+ 4.6%	7,531	7,799	+ 3.6%
Closed Sales		1,293	1,434	+ 10.9%	7,146	7,315	+ 2.4%
Median Sales Price		\$1,070,000	\$1,125,000	+ 5.1%	\$1,070,000	\$1,100,000	+ 2.8%
Average Sales Price		\$1,328,686	\$1,502,205	+ 13.1%	\$1,396,058	\$1,450,620	+ 3.9%
\$ Volume of Closed Sales (in millions)		\$1,714	\$2,148	+ 25.3%	\$9,957	\$10,595	+ 6.4%
Pct. of Orig. Price Received		98.0%	99.1%	+ 1.1%	98.4%	98.7%	+ 0.3%
Days on Market Until Sale		33	32	- 3.0%	34	36	+ 5.9%
Housing Affordability Index		40	39	- 2.5%	40	39	- 2.5%
Inventory of Homes for Sale		4,122	3,047	- 26.1%	—	—	—
Months Supply of Inventory		3.4	2.4	- 29.4%	—	—	—

Attached Market Overview

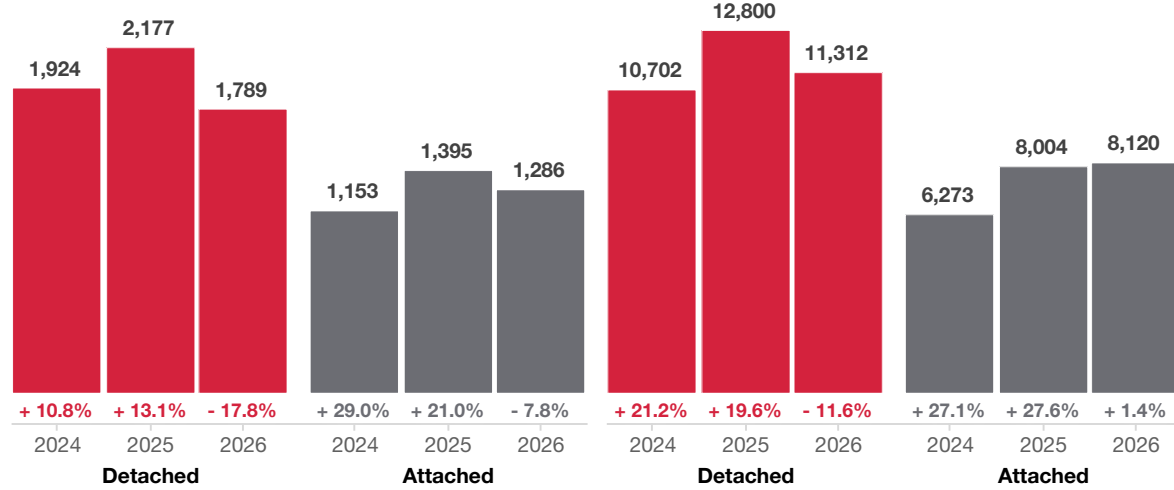
Key metrics by report month and for year-to-date (YTD) starting from the first of the year. **Attached homes only.**

Key Metrics	Historical Sparkbars	6-2025	6-2026	% Change	YTD 2025	YTD 2026	% Change
New Listings		1,395	1,286	- 7.8%	8,004	8,120	+ 1.4%
Pending Sales		672	764	+ 13.7%	4,116	4,479	+ 8.8%
Closed Sales		685	731	+ 6.7%	3,968	4,110	+ 3.6%
Median Sales Price		\$662,500	\$670,000	+ 1.1%	\$675,000	\$665,000	- 1.5%
Average Sales Price		\$829,079	\$801,316	- 3.3%	\$821,042	\$801,803	- 2.3%
\$ Volume of Closed Sales (in millions)		\$564	\$584	+ 3.5%	\$3,243	\$3,285	+ 1.3%
Pct. of Orig. Price Received		97.2%	97.5%	+ 0.3%	98.1%	97.7%	- 0.4%
Days on Market Until Sale		39	43	+ 10.3%	39	44	+ 12.8%
Housing Affordability Index		64	65	+ 1.6%	63	65	+ 3.2%
Inventory of Homes for Sale		2,817	2,830	+ 0.5%	—	—	—
Months Supply of Inventory		4.2	4.0	- 4.8%	—	—	—

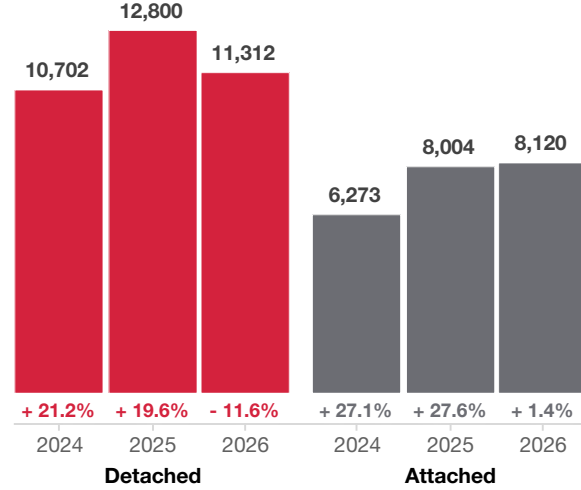
New Listings

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

June

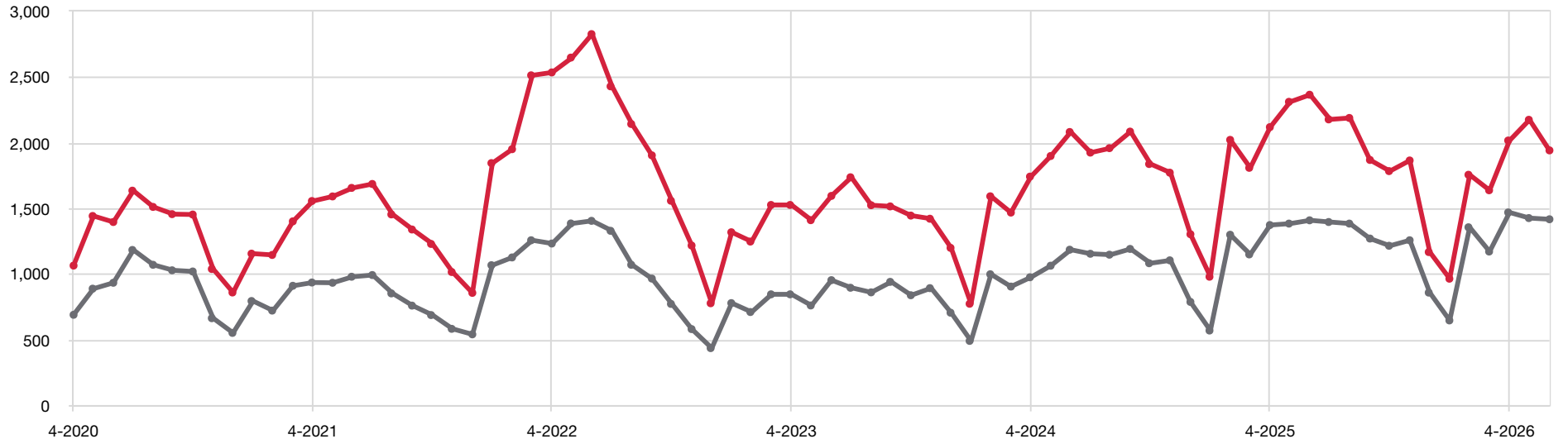


Year to Date



New Listings	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Jul-2025	2,188	+ 11.7%	1,383	+ 20.7%
Aug-2025	1,868	- 10.4%	1,269	+ 6.6%
Sep-2025	1,783	- 2.9%	1,214	+ 12.3%
Oct-2025	1,864	+ 5.3%	1,256	+ 13.9%
Nov-2025	1,166	- 10.4%	857	+ 9.0%
Dec-2025	963	- 1.5%	645	+ 13.6%
Jan-2026	1,755	- 13.2%	1,355	+ 4.4%
Feb-2026	1,637	- 9.5%	1,170	+ 1.9%
Mar-2026	2,016	- 4.8%	1,468	+ 7.0%
Apr-2026	2,174	- 5.9%	1,425	+ 3.0%
May-2026	1,941	- 17.9%	1,416	+ 0.6%
Jun-2026	1,789	- 17.8%	1,286	- 7.8%
12-Month Avg	1,762	- 7.0%	1,229	+ 6.2%

Historical New Listings by Month



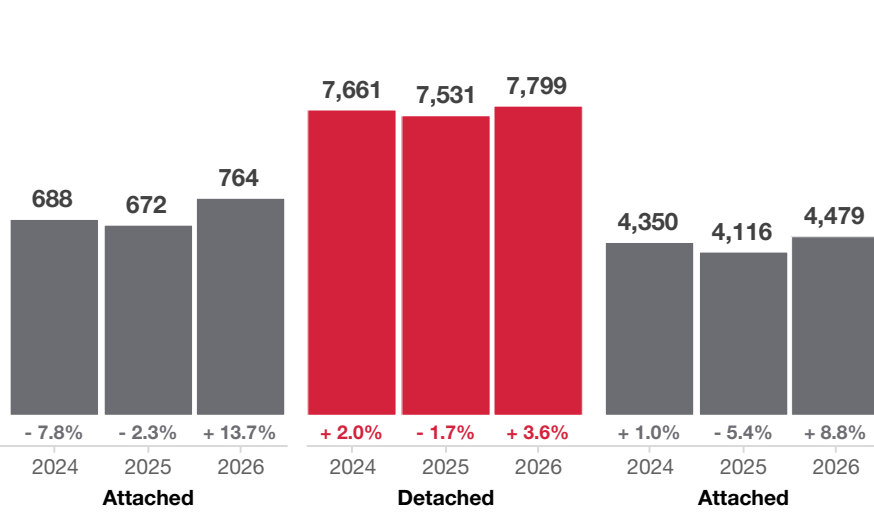
Pending Sales

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

June

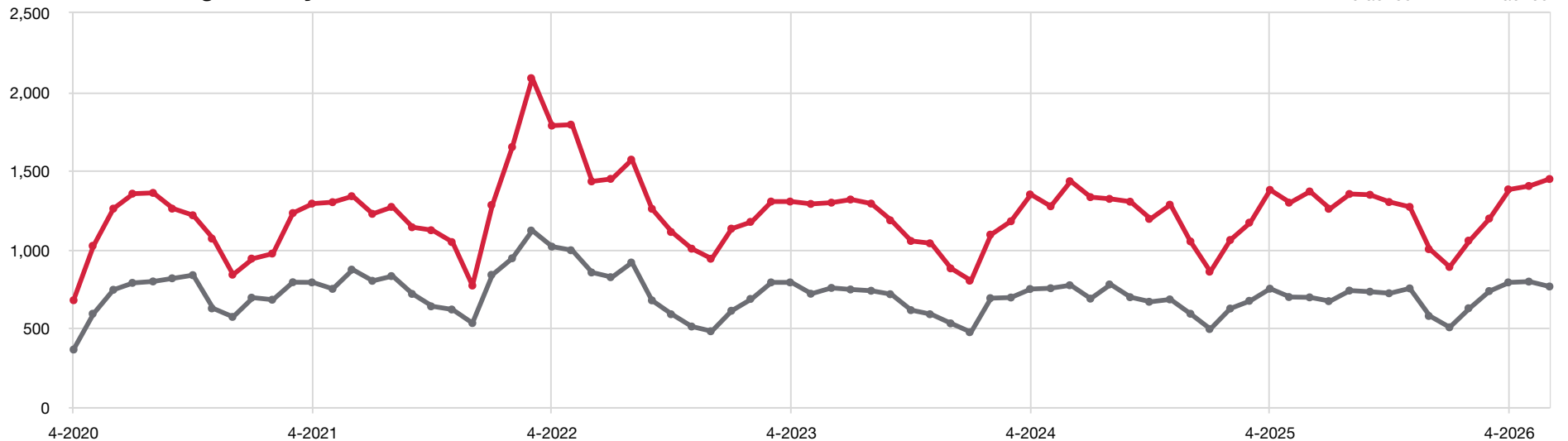


Year to Date



Pending Sales	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Jul-2025	1,352	+ 2.3%	739	- 5.0%
Aug-2025	1,347	+ 3.4%	732	+ 5.0%
Sep-2025	1,301	+ 9.0%	722	+ 8.1%
Oct-2025	1,270	- 1.1%	753	+ 10.2%
Nov-2025	1,002	- 4.7%	578	- 2.4%
Dec-2025	889	+ 3.5%	506	+ 2.2%
Jan-2026	1,056	- 0.4%	627	+ 0.3%
Feb-2026	1,196	+ 2.2%	736	+ 9.2%
Mar-2026	1,381	+ 0.2%	791	+ 5.3%
Apr-2026	1,403	+ 8.2%	796	+ 14.0%
May-2026	1,447	+ 5.8%	765	+ 9.9%
Jun-2026	1,316	+ 4.6%	764	+ 13.7%
12-Month Avg	1,247	+ 2.9%	709	+ 6.0%

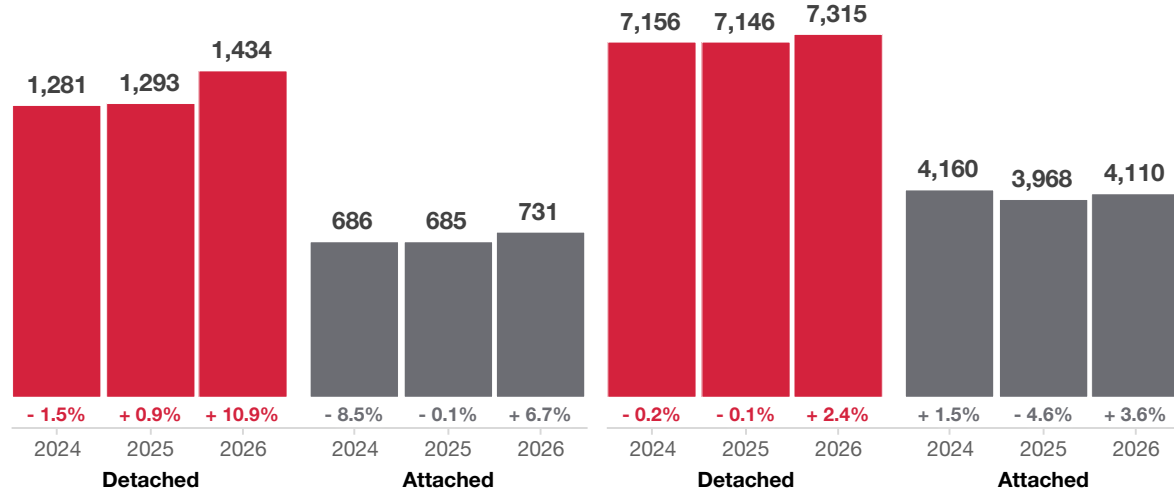
Historical Pending Sales by Month



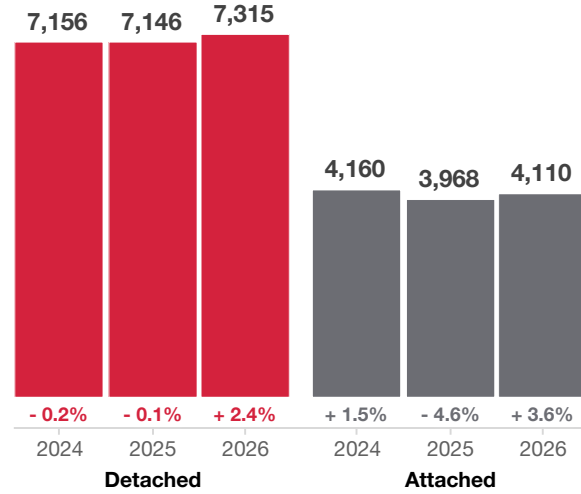
Closed Sales

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

June

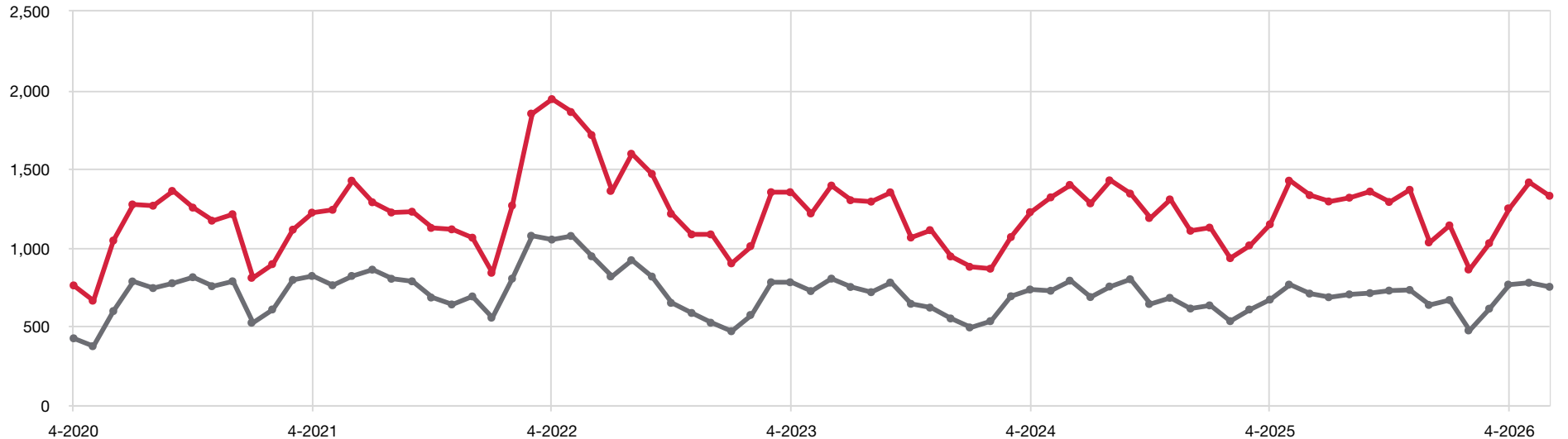


Year to Date



Closed Sales	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Jul-2025	1,317	- 7.7%	703	- 6.6%
Aug-2025	1,356	+ 1.0%	711	- 11.0%
Sep-2025	1,290	+ 8.6%	727	+ 13.2%
Oct-2025	1,367	+ 4.7%	731	+ 7.3%
Nov-2025	1,033	- 6.7%	636	+ 3.8%
Dec-2025	1,141	+ 1.2%	667	+ 5.4%
Jan-2026	861	- 7.7%	474	- 11.1%
Feb-2026	1,028	+ 1.4%	612	+ 0.8%
Mar-2026	1,249	+ 8.8%	765	+ 14.2%
Apr-2026	1,414	- 0.8%	777	+ 1.6%
May-2026	1,329	- 0.3%	751	+ 6.1%
Jun-2026	1,434	+ 10.9%	731	+ 6.7%
12-Month Avg	1,235	+ 1.2%	690	+ 2.4%

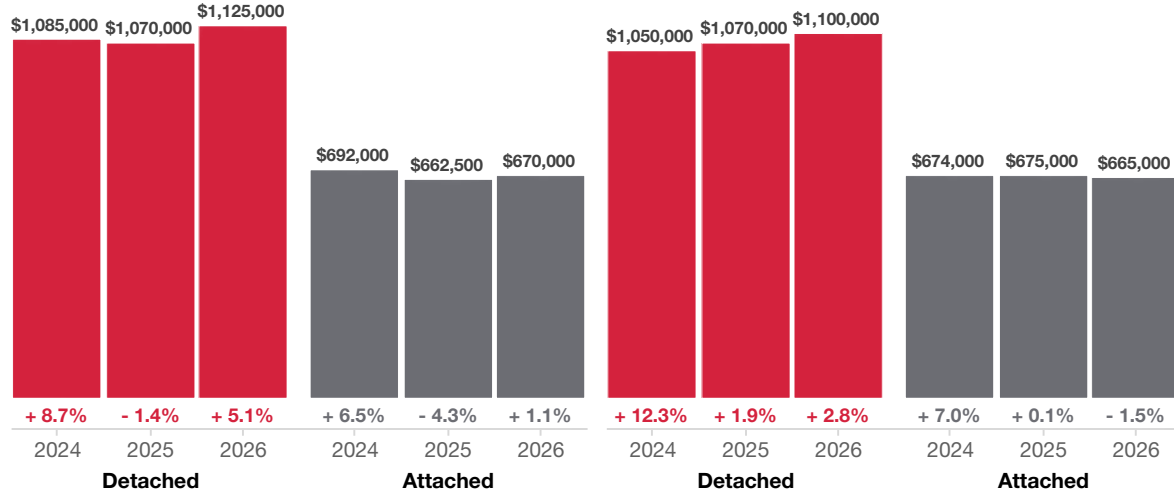
Historical Closed Sales by Month



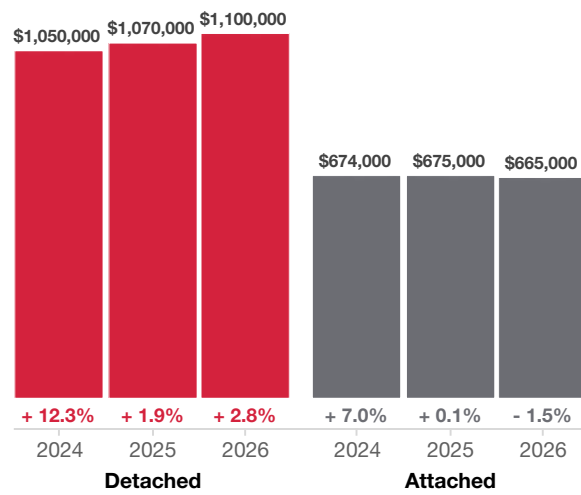
Median Sales Price

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

June



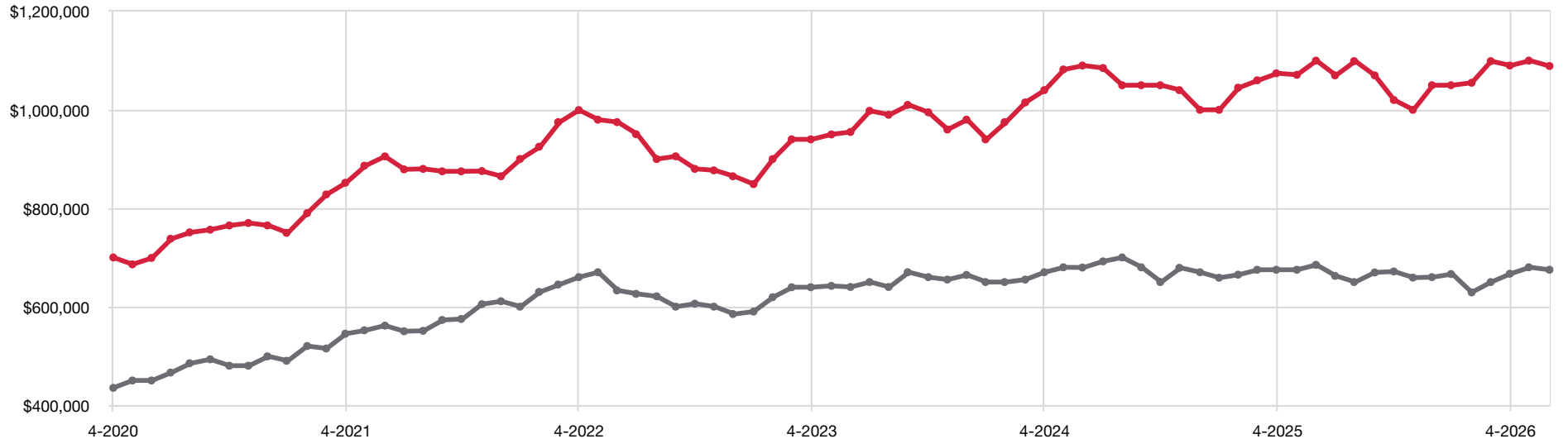
Year to Date



Median Sales Price	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Jul-2025	\$1,099,000	+ 4.7%	\$650,000	- 7.1%
Aug-2025	\$1,070,000	+ 1.9%	\$669,500	- 1.5%
Sep-2025	\$1,020,000	- 2.9%	\$671,500	+ 3.3%
Oct-2025	\$1,000,000	- 3.8%	\$659,000	- 2.9%
Nov-2025	\$1,050,000	+ 5.0%	\$660,000	- 1.5%
Dec-2025	\$1,050,000	+ 5.0%	\$666,250	+ 1.1%
Jan-2026	\$1,055,000	+ 1.0%	\$629,000	- 5.4%
Feb-2026	\$1,098,950	+ 3.7%	\$650,000	- 3.7%
Mar-2026	\$1,090,000	+ 1.5%	\$666,875	- 1.2%
Apr-2026	\$1,100,000	+ 2.7%	\$680,000	+ 0.7%
May-2026	\$1,089,000	- 1.0%	\$675,000	- 1.5%
Jun-2026	\$1,125,000	+ 5.1%	\$670,000	+ 1.1%
12-Month Avg*	\$1,070,000	+ 1.9%	\$663,000	- 1.8%

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

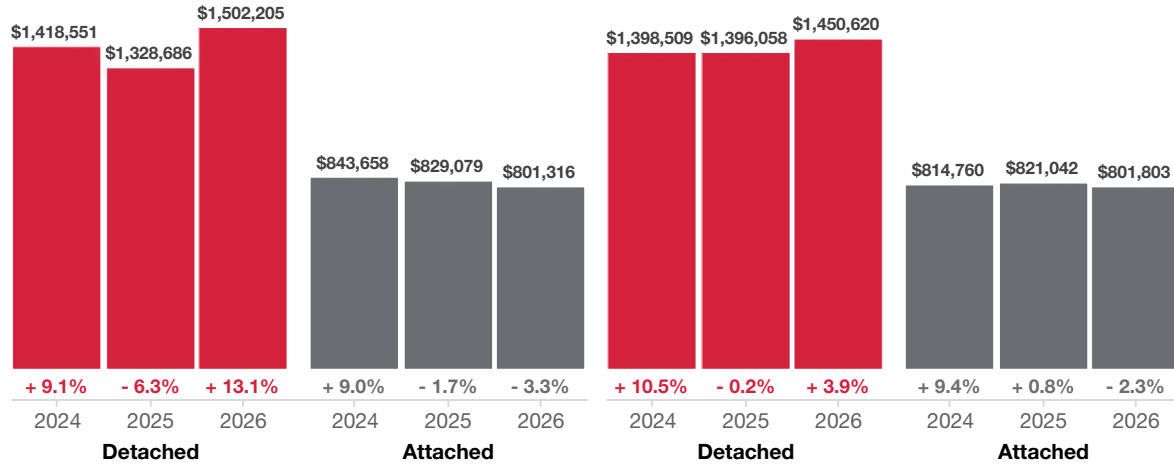
Historical Median Sales Price by Month



Average Sales Price

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

June

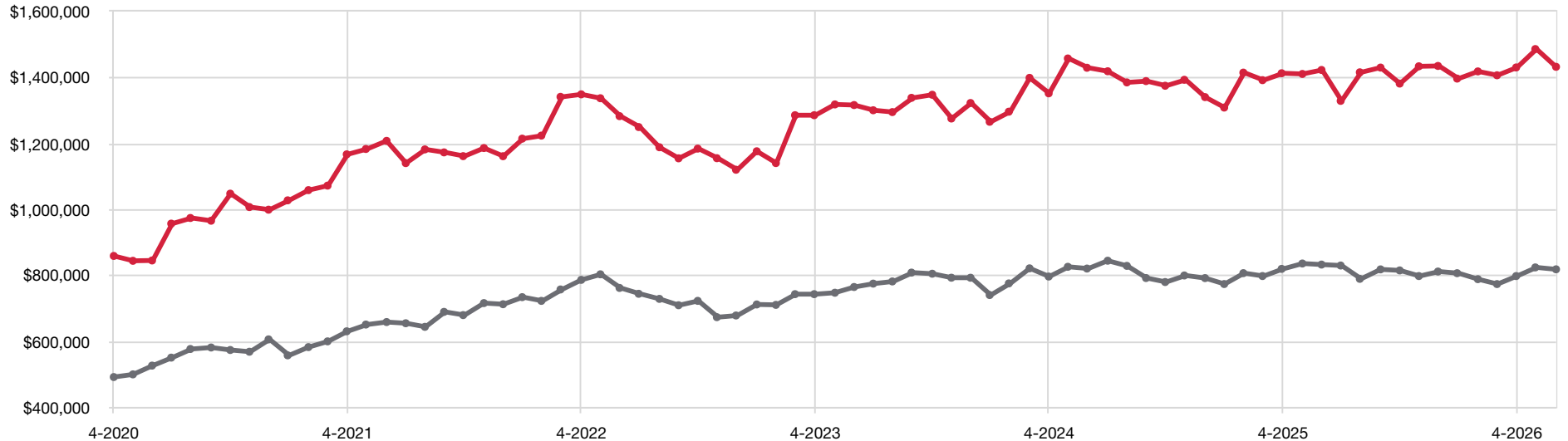


Year to Date

Avg. Sales Price	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Jul-2025	\$1,415,380	+ 2.2%	\$788,631	- 4.8%
Aug-2025	\$1,429,717	+ 3.0%	\$817,331	+ 3.3%
Sep-2025	\$1,381,182	+ 0.5%	\$814,204	+ 4.5%
Oct-2025	\$1,433,601	+ 2.9%	\$797,098	- 0.2%
Nov-2025	\$1,434,662	+ 7.1%	\$810,822	+ 2.5%
Dec-2025	\$1,396,304	+ 6.7%	\$805,811	+ 4.3%
Jan-2026	\$1,418,092	+ 0.3%	\$787,632	- 2.3%
Feb-2026	\$1,406,385	+ 1.1%	\$772,787	- 3.1%
Mar-2026	\$1,430,094	+ 1.2%	\$797,087	- 2.7%
Apr-2026	\$1,485,921	+ 5.4%	\$823,320	- 1.4%
May-2026	\$1,432,029	+ 0.7%	\$817,539	- 1.7%
Jun-2026	\$1,502,205	+ 13.1%	\$801,316	- 3.3%
12-Month Avg*	\$1,432,725	+ 3.7%	\$803,736	- 0.5%

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

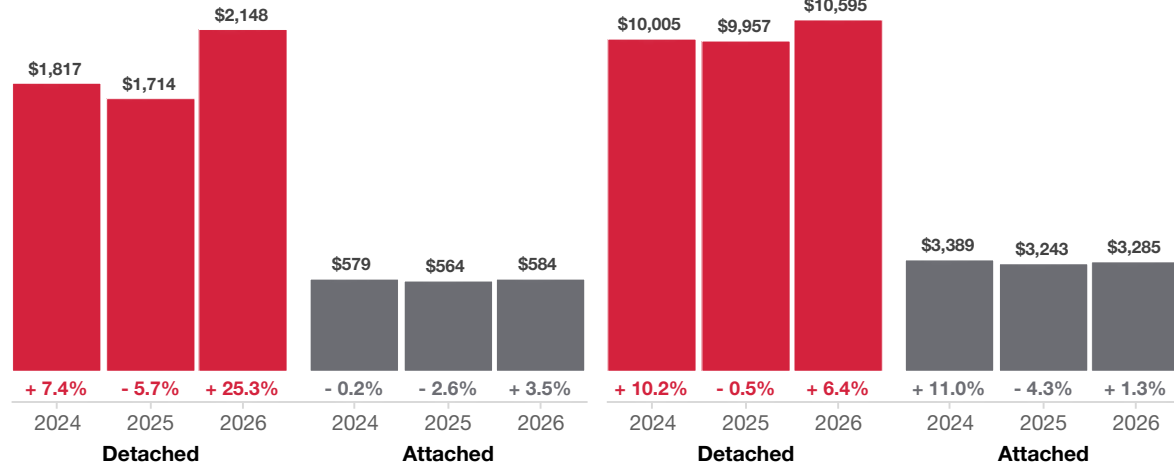
Historical Average Sales Price by Month



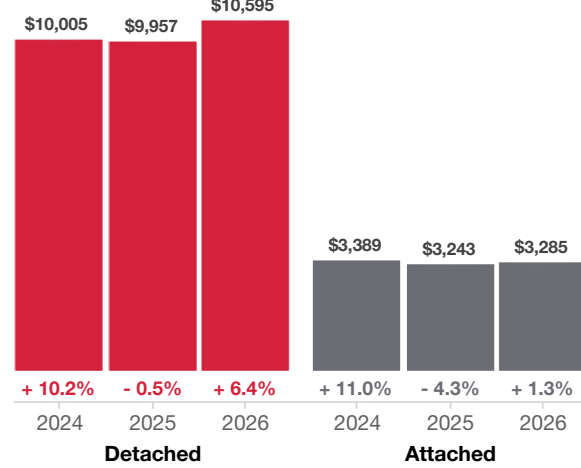
Dollar Volume of Closed Sales (in millions)

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

June

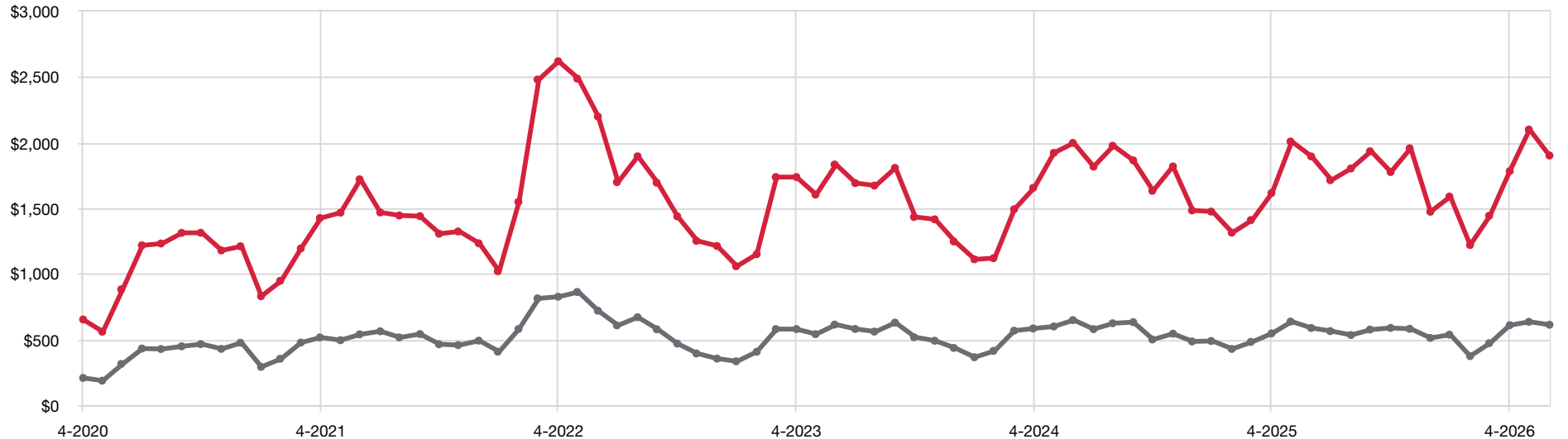


Year to Date



	\$ Volume of Closed Sales (in millions)		Year-Over-Year Change	
	Detached	Attached	Detached	Attached
Jul-2025	\$1,803	\$534	- 8.8%	- 14.4%
Aug-2025	\$1,934	\$575	+ 3.7%	- 9.0%
Sep-2025	\$1,776	\$588	+ 8.8%	+ 17.6%
Oct-2025	\$1,957	\$581	+ 7.6%	+ 6.8%
Nov-2025	\$1,473	\$512	- 0.7%	+ 5.6%
Dec-2025	\$1,589	\$537	+ 7.7%	+ 10.0%
Jan-2026	\$1,220	\$373	- 7.2%	- 12.9%
Feb-2026	\$1,443	\$471	+ 2.3%	- 2.1%
Mar-2026	\$1,783	\$609	+ 10.3%	+ 11.5%
Apr-2026	\$2,100	\$635	+ 4.6%	- 0.2%
May-2026	\$1,902	\$612	+ 0.4%	+ 4.3%
Jun-2026	\$2,148	\$584	+ 25.3%	+ 3.5%
12-Month Avg	\$1,761	\$551	+ 4.6%	+ 1.5%

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

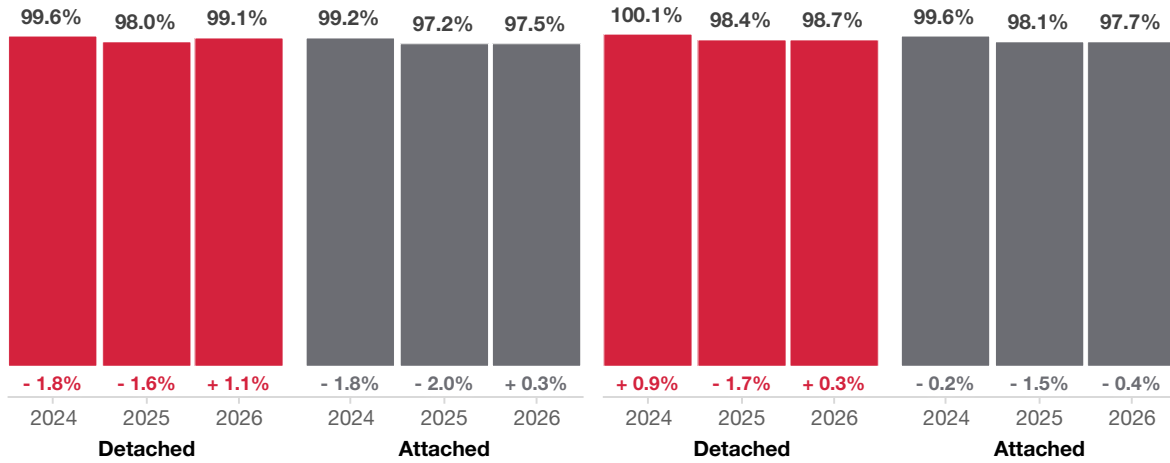


Percent of Original List Price Received

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.

June

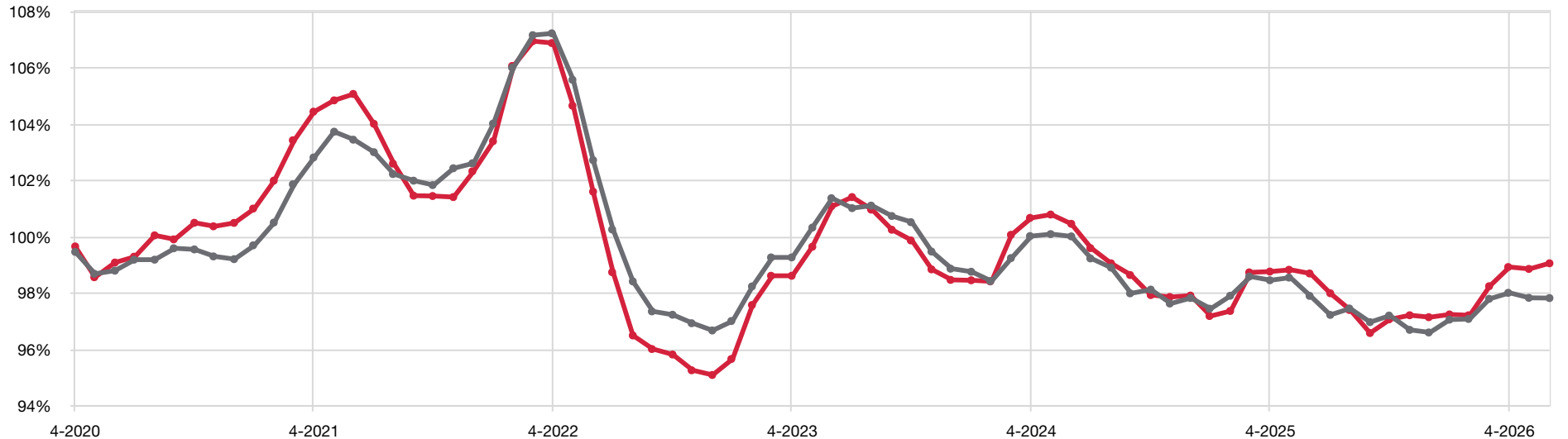
Year to Date



Pct. of Orig. Price Received	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Jul-2025	97.4%	- 1.6%	97.4%	- 1.5%
Aug-2025	96.6%	- 2.0%	96.9%	- 1.1%
Sep-2025	97.0%	- 0.9%	97.2%	- 0.9%
Oct-2025	97.2%	- 0.6%	96.7%	- 0.9%
Nov-2025	97.1%	- 0.8%	96.6%	- 1.2%
Dec-2025	97.2%	0.0%	97.0%	- 0.4%
Jan-2026	97.2%	- 0.1%	97.1%	- 0.8%
Feb-2026	98.2%	- 0.5%	97.8%	- 0.8%
Mar-2026	98.9%	+ 0.2%	98.0%	- 0.4%
Apr-2026	98.8%	0.0%	97.8%	- 0.7%
May-2026	99.0%	+ 0.3%	97.8%	- 0.1%
Jun-2026	99.1%	+ 1.1%	97.5%	+ 0.3%
12-Month Avg*	97.9%	- 0.4%	97.3%	- 0.7%

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

Historical Percent of Original List Price Received by Month

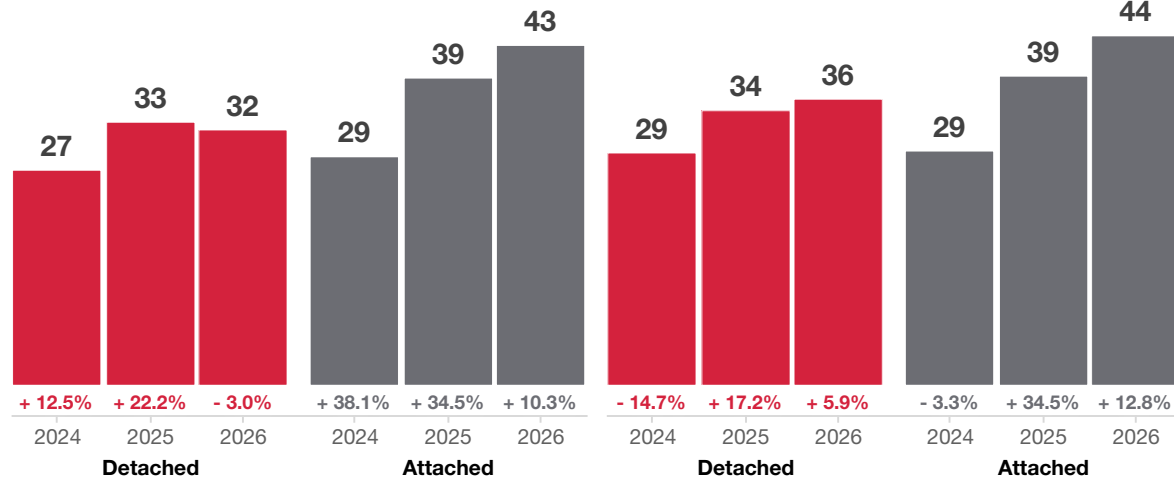


Days on Market Until Sale

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

June

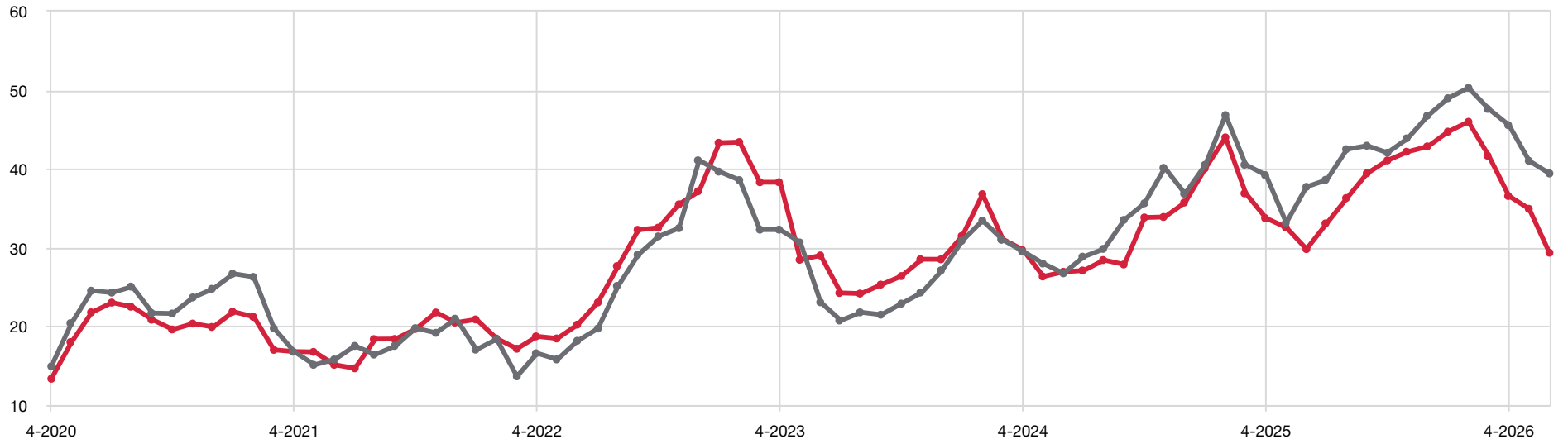
Year to Date



Days on Market	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
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	45	+ 12.5%	49	+ 22.5%
Jan-2026	46	+ 4.5%	50	+ 6.4%
Feb-2026	42	+ 13.5%	48	+ 17.1%
Mar-2026	37	+ 8.8%	46	+ 17.9%
Apr-2026	35	+ 6.1%	41	+ 24.2%
May-2026	29	- 3.3%	39	+ 2.6%
Jun-2026	32	- 3.0%	43	+ 10.3%
12-Month Avg*	38	+ 14.1%	44	+ 18.3%

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

Historical Days on Market Until Sale by Month

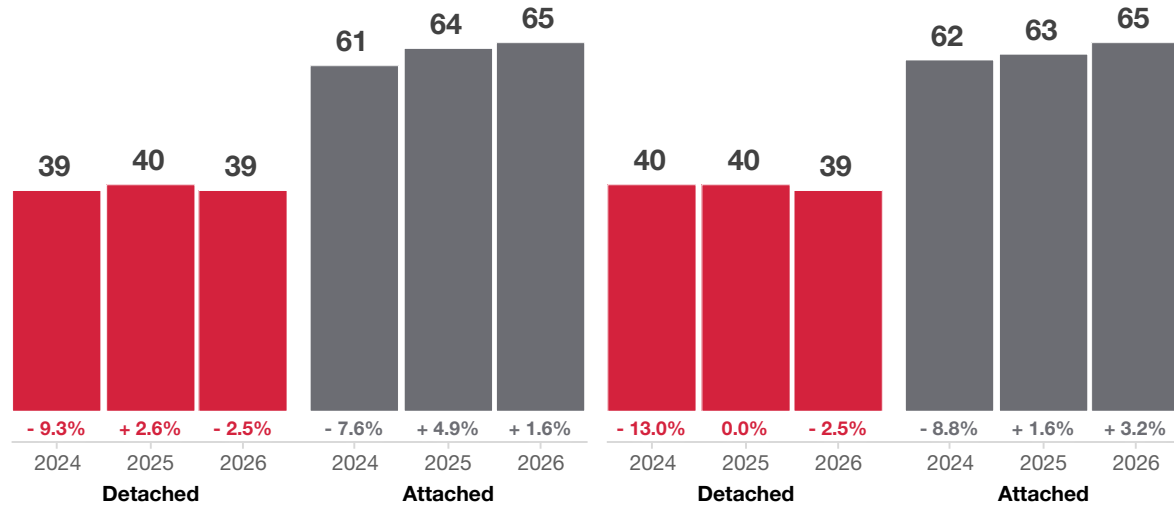


Housing Affordability Index

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.

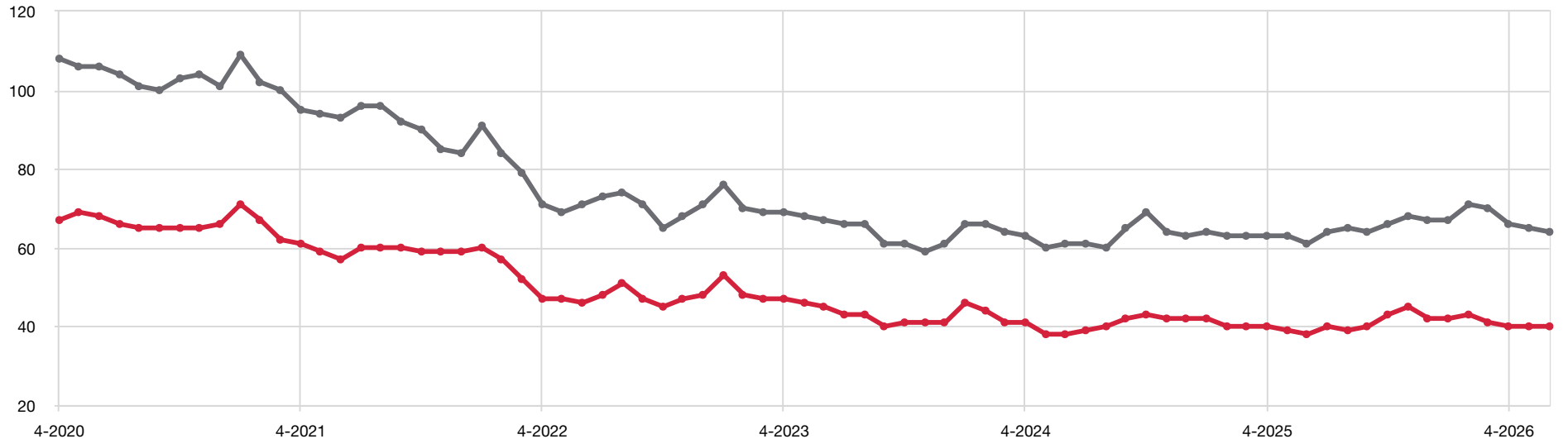
June

Year to Date



Affordability Index	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Jul-2025	39	- 2.5%	65	+ 8.3%
Aug-2025	40	- 4.8%	64	- 1.5%
Sep-2025	43	0.0%	66	- 4.3%
Oct-2025	45	+ 7.1%	68	+ 6.3%
Nov-2025	42	0.0%	67	+ 6.3%
Dec-2025	42	0.0%	67	+ 4.7%
Jan-2026	43	+ 7.5%	71	+ 12.7%
Feb-2026	41	+ 2.5%	70	+ 11.1%
Mar-2026	40	0.0%	66	+ 4.8%
Apr-2026	40	+ 2.6%	65	+ 3.2%
May-2026	40	+ 5.3%	64	+ 4.9%
Jun-2026	39	- 2.5%	65	+ 1.6%
12-Month Avg	41	+ 1.2%	67	+ 4.7%

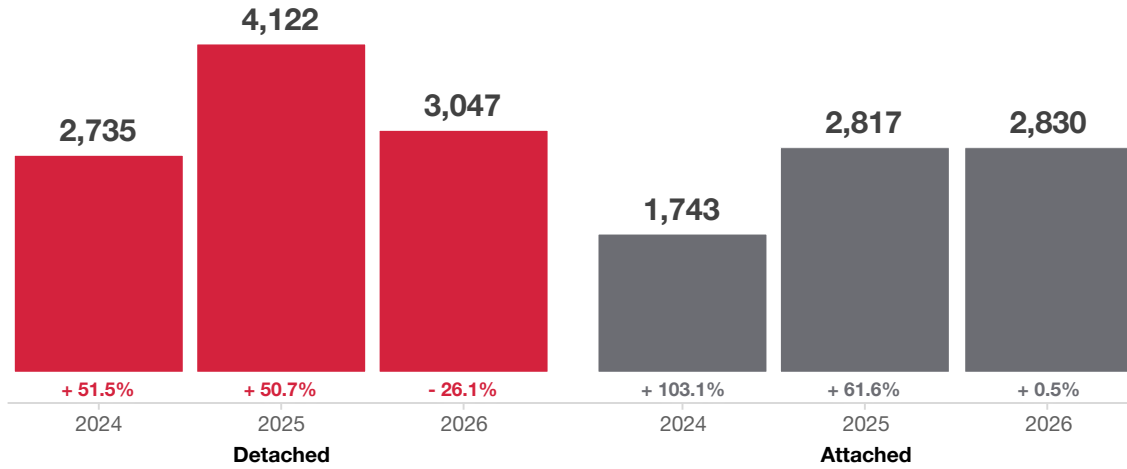
Historical Housing Affordability Index by Month



Inventory of Homes for Sale

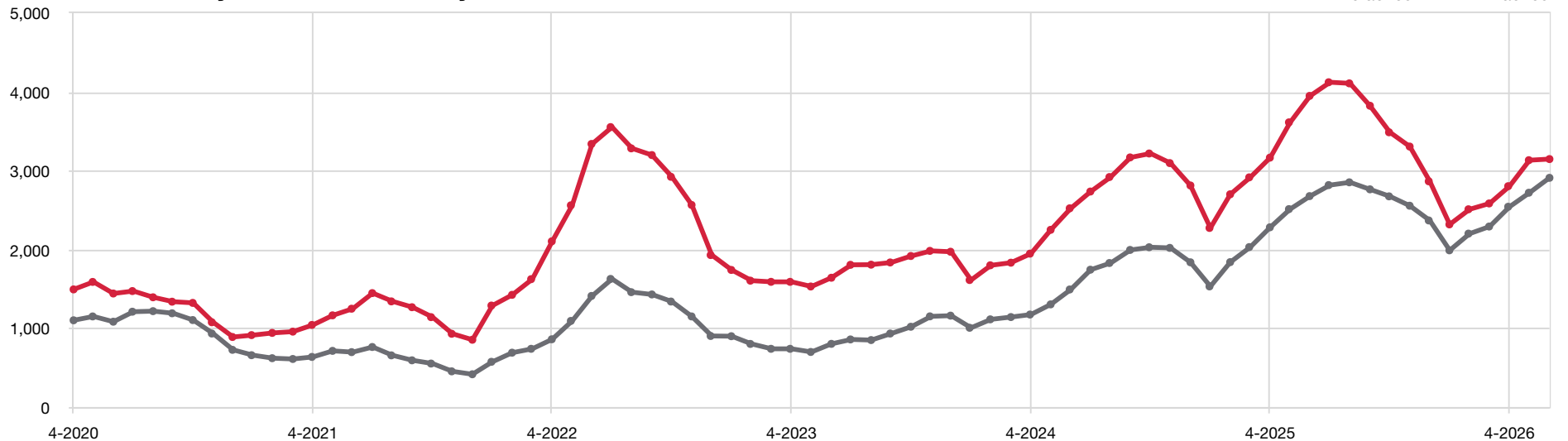
The number of properties available for sale in active status at the end of a given month.

June



Homes for Sale	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Jul-2025	4,108	+ 40.7%	2,852	+ 56.0%
Aug-2025	3,824	+ 20.7%	2,763	+ 38.6%
Sep-2025	3,487	+ 8.4%	2,674	+ 31.9%
Oct-2025	3,306	+ 6.8%	2,555	+ 26.5%
Nov-2025	2,865	+ 1.9%	2,368	+ 28.9%
Dec-2025	2,318	+ 2.0%	1,989	+ 29.9%
Jan-2026	2,510	- 7.0%	2,201	+ 19.7%
Feb-2026	2,584	- 11.4%	2,291	+ 12.9%
Mar-2026	2,803	- 11.4%	2,542	+ 11.4%
Apr-2026	3,133	- 13.3%	2,720	+ 8.3%
May-2026	3,147	- 20.3%	2,909	+ 8.7%
Jun-2026	3,047	- 26.1%	2,830	+ 0.5%
12-Month Avg	3,094	- 2.2%	2,558	+ 20.9%

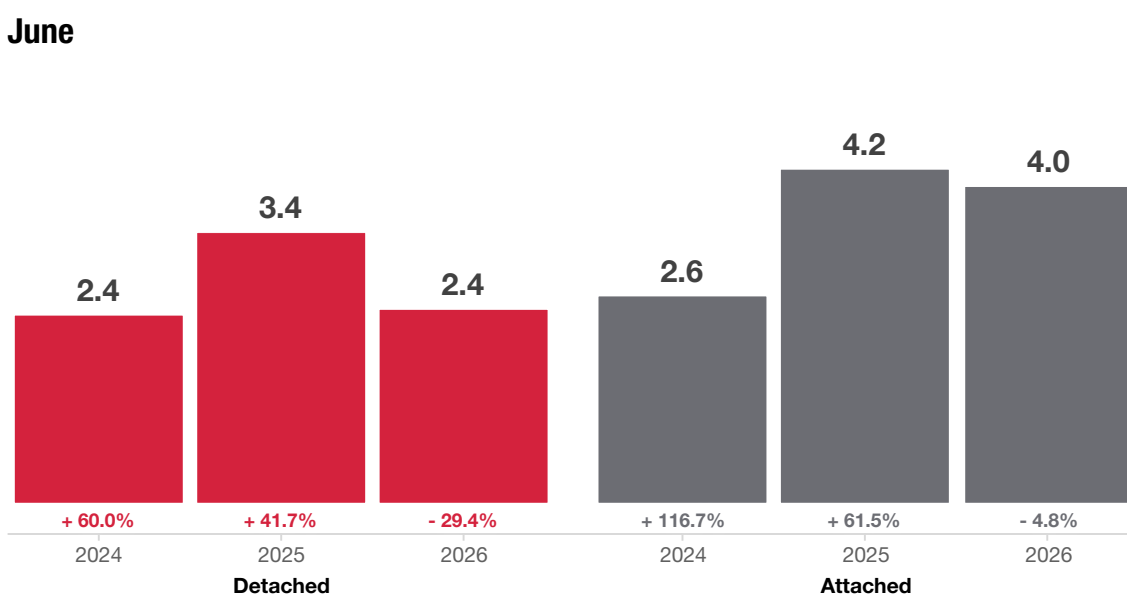
Historical Inventory of Homes for Sale by Month



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.

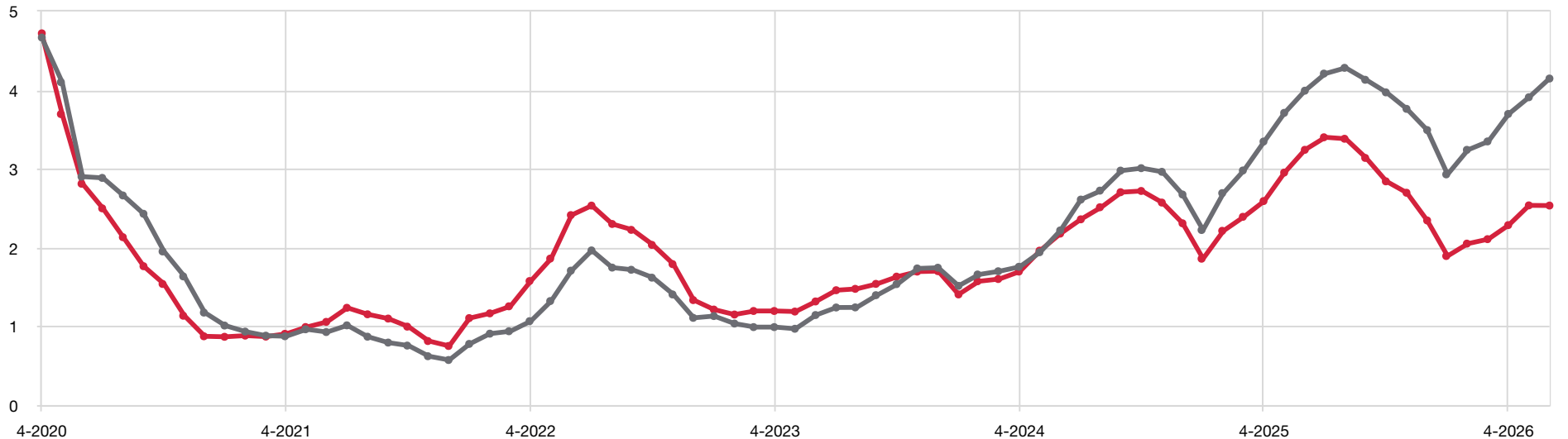
June



Months Supply	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
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	2.1	- 4.5%	3.2	+ 18.5%
Feb-2026	2.1	- 12.5%	3.3	+ 10.0%
Mar-2026	2.3	- 11.5%	3.7	+ 12.1%
Apr-2026	2.5	- 16.7%	3.9	+ 5.4%
May-2026	2.5	- 21.9%	4.1	+ 2.5%
Jun-2026	2.4	- 29.4%	4.0	- 4.8%
12-Month Avg*	2.5	- 3.8%	3.7	+ 19.7%

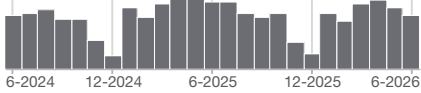
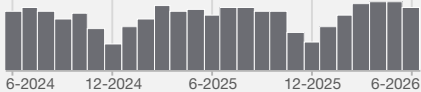
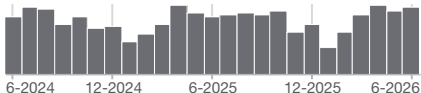
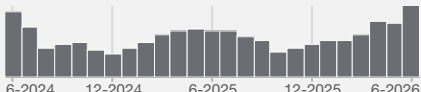




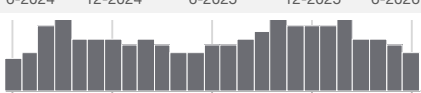
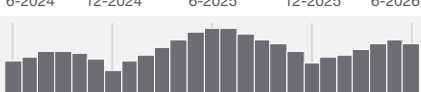
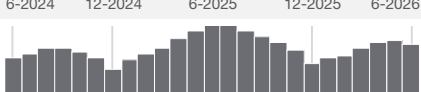
* Months Supply for all properties from July 2025 through June 2026. This is not the average of the individual figures above.

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	6-2025	6-2026	% Change	YTD 2025	YTD 2026	% Change
New Listings		3,572	3,075	- 13.9%	20,804	19,432	- 6.6%
Pending Sales		1,930	2,080	+ 7.8%	11,647	12,278	+ 5.4%
Closed Sales		1,978	2,165	+ 9.5%	11,114	11,425	+ 2.8%
Median Sales Price		\$910,000	\$950,000	+ 4.4%	\$903,223	\$915,000	+ 1.3%
Average Sales Price		\$1,156,232	\$1,265,545	+ 9.5%	\$1,191,102	\$1,217,465	+ 2.2%
\$ Volume of Closed Sales (in millions)		\$2,278	\$2,732	+ 19.9%	\$13,200	\$13,880	+ 5.2%
Pct. of Orig. Price Received		97.7%	98.6%	+ 0.9%	98.3%	98.3%	0.0%
Days on Market Until Sale		35	36	+ 2.9%	36	39	+ 8.3%
Housing Affordability Index		47	46	- 2.1%	47	47	0.0%
Inventory of Homes for Sale		6,939	5,877	- 15.3%	—	—	—
Months Supply of Inventory		3.7	3.0	- 18.9%	—	—	—