

# Monthly Indicators



## October 2025

U.S. existing-home sales climbed 1.5% month-over-month and 4.1% year-over-year, reaching a seasonally adjusted annual rate of 4.06 million units, according to the National Association of REALTORS® (NAR). The increase was partly driven by falling mortgage rates, which recently hit their lowest level in more than a year. Regionally, monthly sales advanced in the Northeast, South, and West, while the Midwest experienced a slight decline.

New Listings decreased 12.9 percent for Detached homes and 16.6 percent for Attached homes. Pending Sales decreased 34.9 percent for Detached homes and 47.0 percent for Attached homes. Inventory decreased 1.4 percent for Detached homes but increased 26.4 percent for Attached homes.

Median Sales Price increased 3.7 percent to \$1,399,500 for Detached homes but decreased 3.2 percent to \$750,000 for Attached homes. Days on Market increased 34.5 percent for Detached homes and 36.7 percent for Attached homes. Months Supply of Inventory remained flat for Detached homes but increased 34.6 percent for Attached properties.

Housing inventory edged up 1.3% from the previous month to 1.55 million units, 14.0% higher than the same period last year. This represents a 4.6-month supply at the current sales pace, according to NAR. The median existing-home price grew 2.1% year-over-year to \$415,200, continuing the trend of annual price gains. The Midwest saw the largest year-over-year increase in median sales price, followed by the Northeast and South, while prices remained mostly flat in the West.

## Monthly Snapshot

<b>+ 3.7%</b>	<b>- 3.2%</b>	<b>+ 3.0%</b>
Change in Number of <b>Median Sales Price</b> Detached	Change in Number of <b>Median Sales Price</b> Attached	Change in Number of <b>Median Sales Price</b> Combined












Residential real estate activity in Orange County composed of attached and detached properties combined with market overviews for each independently. The accuracy of all information is deemed reliable but not guaranteed and should be personally verified through personal inspection by and/or with the appropriate professionals. 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 properties only.



Key Metrics	Historical Sparkbars	10-2024	10-2025	% Change	YTD 2024	YTD 2025	% Change
New Listings		1,321	1,150	- 12.9%	16,055	17,345	+ 8.0%
Pending Sales		1,075	700	- 34.9%	12,318	12,185	- 1.1%
Closed Sales		1,104	1,204	+ 9.1%	12,193	12,613	+ 3.4%
Days on Market Until Sale		29	39	+ 34.5%	24	33	+ 37.5%
Median Sales Price		\$1,350,000	\$1,399,500	+ 3.7%	\$1,400,000	\$1,425,000	+ 1.8%
Average Sales Price		\$1,813,395	\$1,851,239	+ 2.1%	\$1,856,124	\$1,905,133	+ 2.6%
Pct. of Orig. Price Received		98.5%	97.5%	- 1.0%	100.1%	98.2%	- 1.9%
Percent of List Price Received		99.8%	99.3%	- 0.5%	100.9%	99.6%	- 1.3%
Housing Affordability Index		35	35	0.0%	34	34	0.0%
Inventory of Homes for Sale		2,965	2,924	- 1.4%	—	—	—
Months Supply of Inventory		2.9	2.9	0.0%	—	—	—

The accuracy of all information is deemed reliable but not guaranteed and should be personally verified through personal inspection by and/or with the appropriate professionals.

# Attached Market Overview

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



Key Metrics	Historical Sparkbars	10-2024	10-2025	% Change	YTD 2024	YTD 2025	% Change
New Listings		919	766	- 16.6%	10,188	11,132	+ 9.3%
Pending Sales		685	363	- 47.0%	8,009	7,636	- 4.7%
Closed Sales		712	715	+ 0.4%	7,925	7,961	+ 0.5%
Days on Market Until Sale		30	41	+ 36.7%	25	35	+ 40.0%
Median Sales Price		\$775,000	\$750,000	- 3.2%	\$759,250	\$770,000	+ 1.4%
Average Sales Price		\$944,111	\$894,854	- 5.2%	\$888,901	\$911,204	+ 2.5%
Pct. of Orig. Price Received		98.5%	96.9%	- 1.6%	99.6%	97.9%	- 1.7%
Percent of List Price Received		99.7%	98.8%	- 0.9%	100.4%	99.3%	- 1.1%
Housing Affordability Index		61	65	+ 6.6%	62	63	+ 1.6%
Inventory of Homes for Sale		1,744	2,205	+ 26.4%	—	—	—
Months Supply of Inventory		2.6	3.5	+ 34.6%	—	—	—

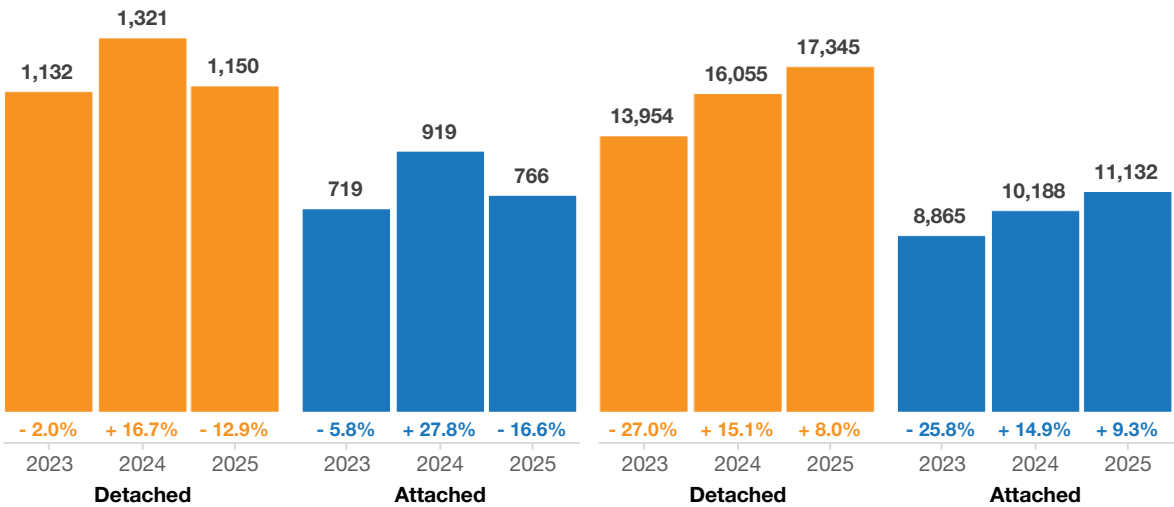
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# New Listings

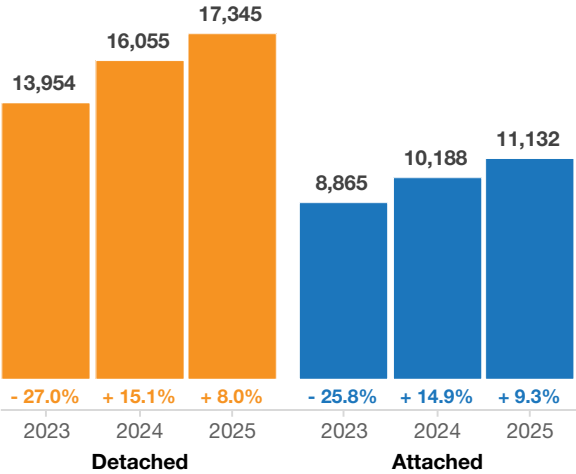
A count of the properties that have been newly listed on the market in a given month.



## October

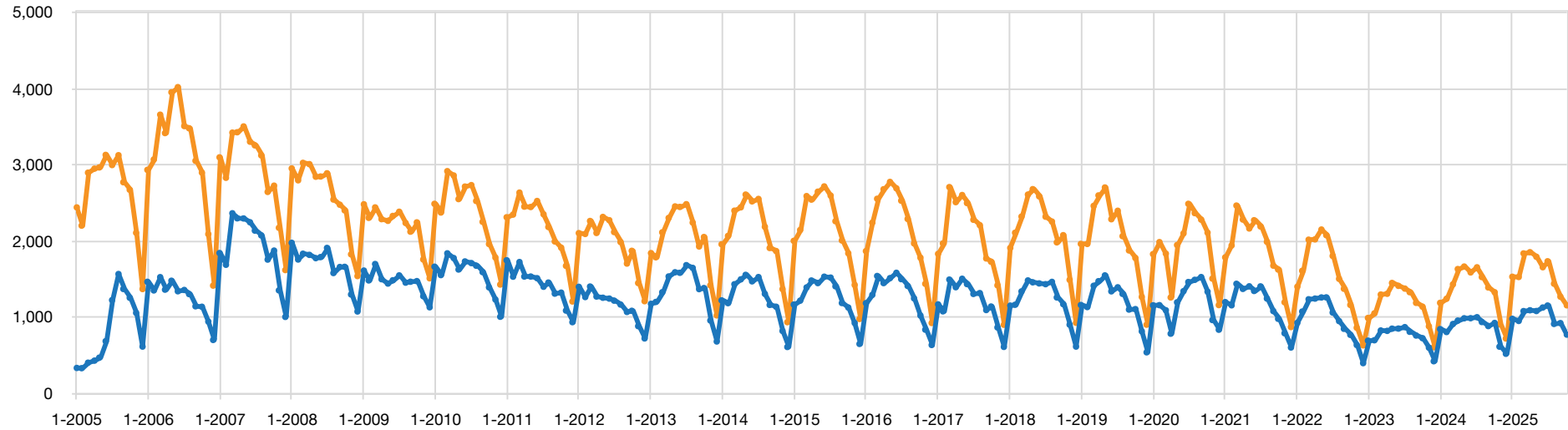


## Year to Date



New Listings	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Nov-2024	901	+ 3.0%	608	+ 2.2%
Dec-2024	715	+ 19.2%	515	+ 23.5%
Jan-2025	1,524	+ 28.9%	973	+ 16.1%
Feb-2025	1,521	+ 23.1%	945	+ 18.1%
Mar-2025	1,830	+ 28.4%	1,074	+ 18.7%
Apr-2025	1,846	+ 13.6%	1,085	+ 14.2%
May-2025	1,786	+ 7.7%	1,075	+ 9.7%
Jun-2025	1,649	+ 4.3%	1,121	+ 14.3%
Jul-2025	1,727	+ 4.8%	1,147	+ 15.4%
Aug-2025	1,433	- 5.7%	906	- 2.7%
Sep-2025	1,263	- 8.7%	917	+ 4.4%
Oct-2025	1,150	- 12.9%	766	- 16.6%
12-Month Avg	1,445	+ 8.0%	928	+ 9.3%

## Historical New Listings by Month



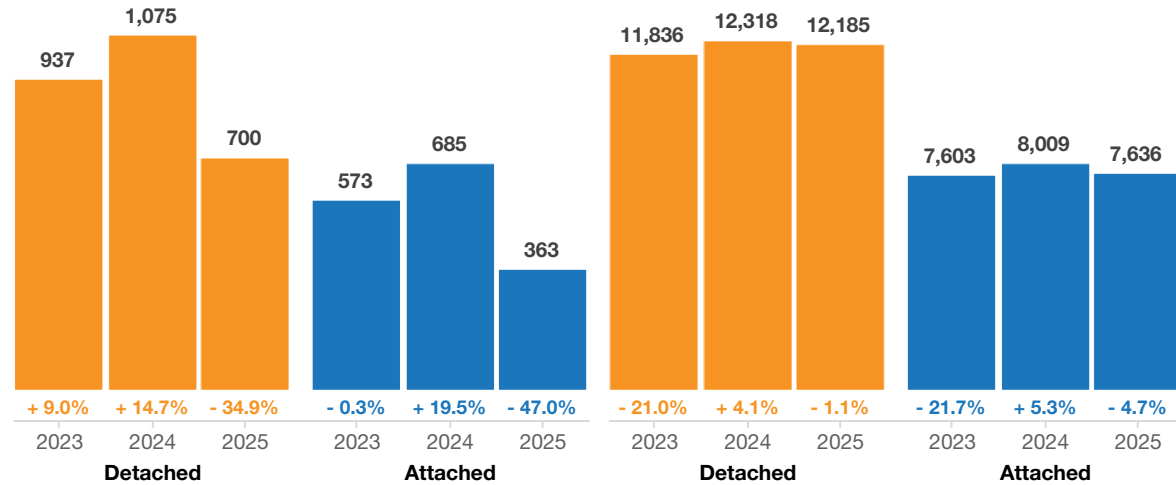
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# Pending Sales

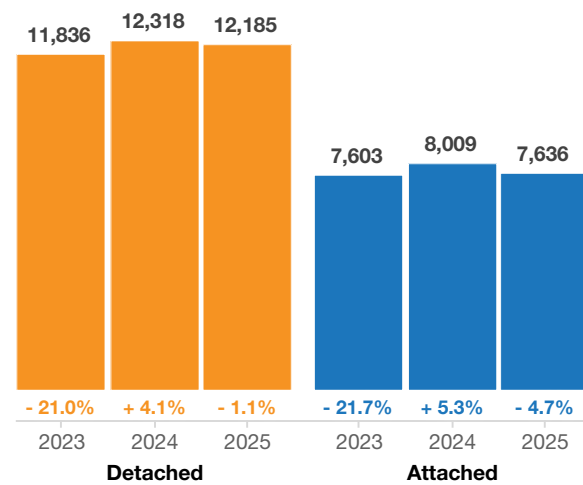
A count of the properties on which offers have been accepted in a given month.



## October

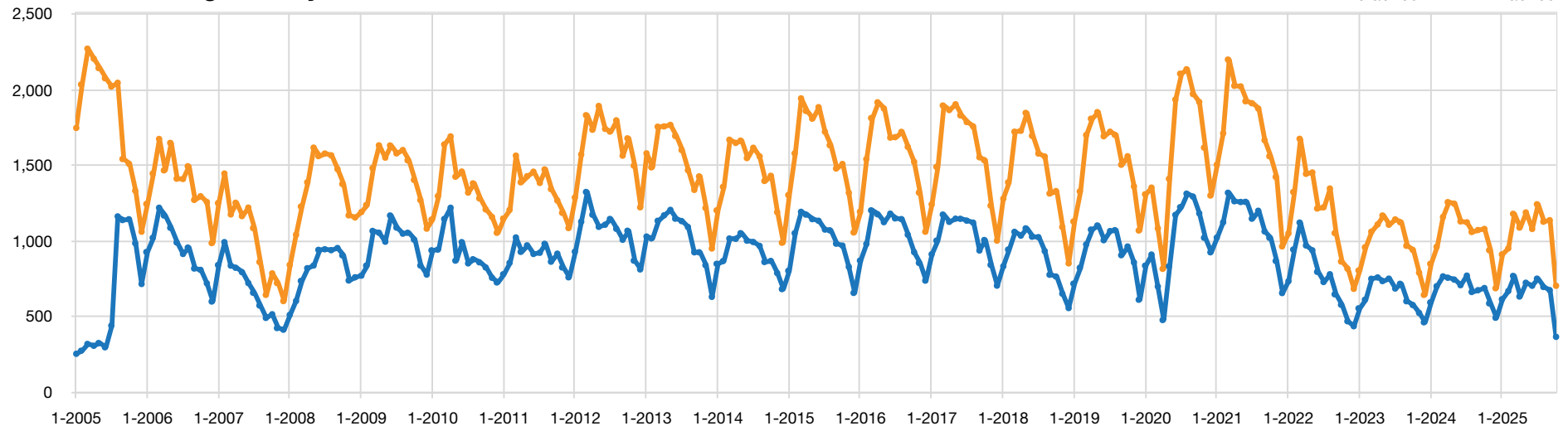


## Year to Date



Pending Sales	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Nov-2024	935	+ 19.0%	584	+ 12.1%
Dec-2024	684	+ 6.9%	489	+ 6.5%
Jan-2025	907	+ 7.3%	611	+ 3.6%
Feb-2025	947	- 1.0%	665	- 4.6%
Mar-2025	1,175	+ 1.8%	765	+ 0.4%
Apr-2025	1,084	- 13.4%	629	- 16.5%
May-2025	1,184	- 4.7%	720	- 2.8%
Jun-2025	1,075	- 4.4%	700	- 0.6%
Jul-2025	1,238	+ 10.6%	747	- 2.6%
Aug-2025	1,123	+ 6.4%	692	+ 5.0%
Sep-2025	1,133	+ 6.1%	671	0.0%
<b>Oct-2025</b>	<b>700</b>	<b>- 34.9%</b>	<b>363</b>	<b>- 47.0%</b>
12-Month Avg	1,015	- 1.2%	636	- 4.6%

## Historical Pending Sales by Month



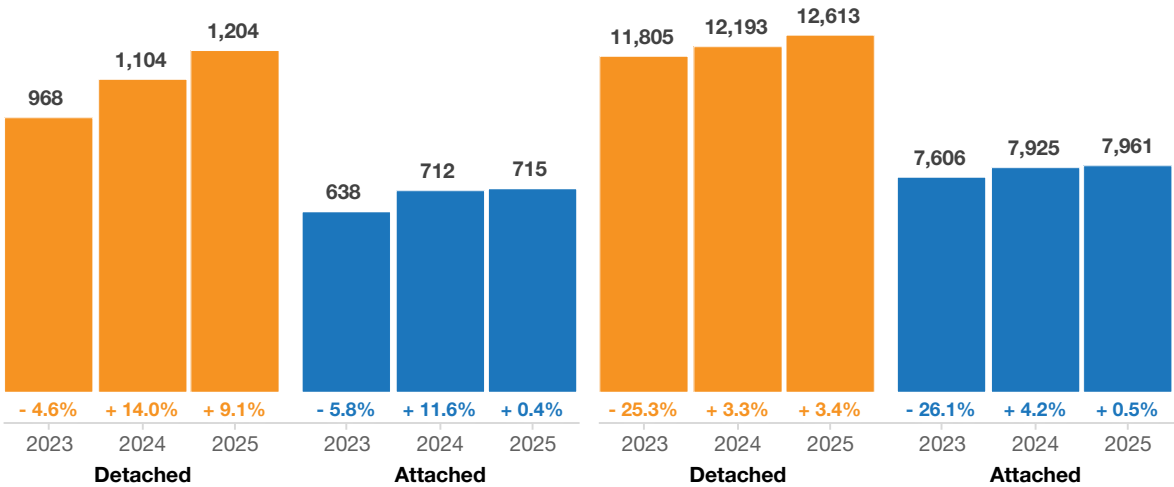
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# Closed Sales

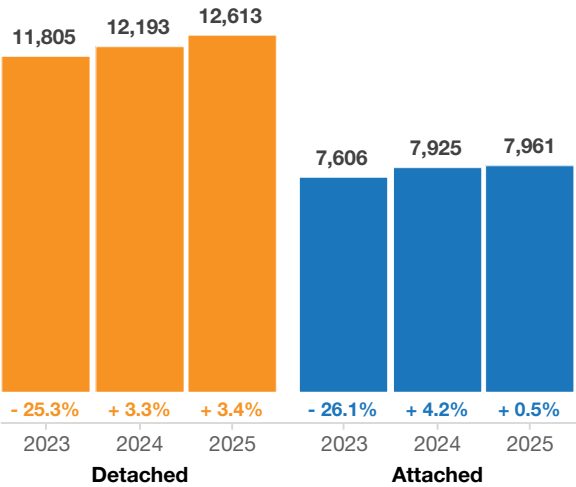
A count of the actual sales that closed in a given month.



## October

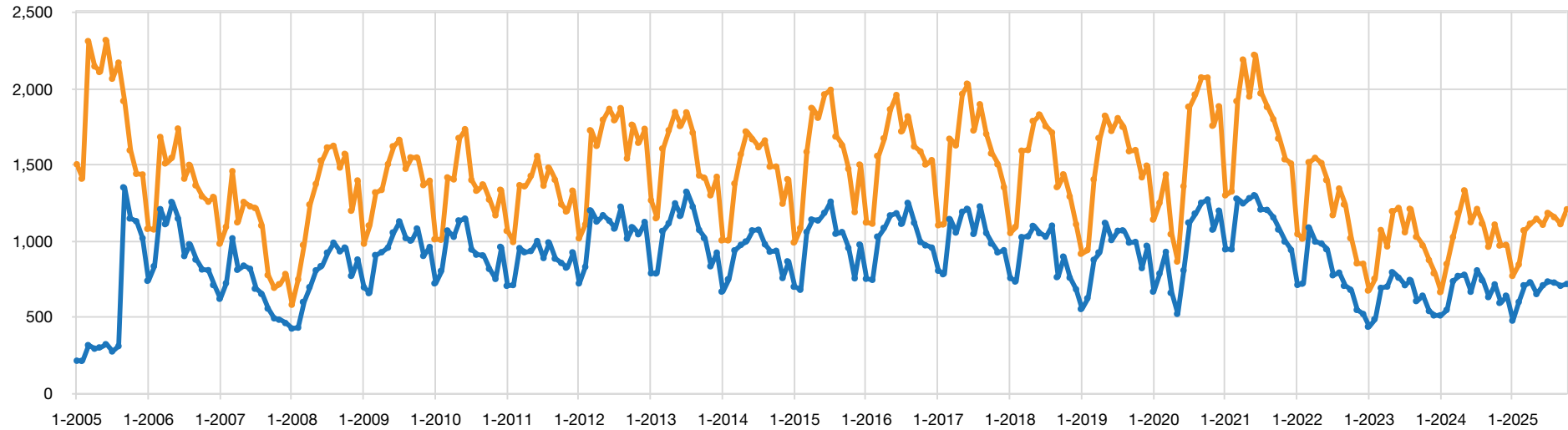


## Year to Date



Closed Sales	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Nov-2024	967	+ 10.9%	591	+ 9.9%
Dec-2024	971	+ 23.7%	638	+ 25.3%
Jan-2025	768	+ 16.0%	475	- 6.7%
Feb-2025	842	- 0.5%	597	+ 9.5%
Mar-2025	1,066	+ 4.3%	706	- 3.7%
Apr-2025	1,110	- 5.8%	726	- 5.3%
May-2025	1,142	- 14.0%	649	- 16.3%
Jun-2025	1,103	- 1.5%	706	+ 6.3%
Jul-2025	1,180	- 2.2%	731	- 9.1%
Aug-2025	1,153	+ 3.8%	724	- 2.2%
Sep-2025	1,107	+ 15.4%	703	+ 11.8%
Oct-2025	1,204	+ 9.1%	715	+ 0.4%
12-Month Avg	1,051	+ 3.4%	663	+ 0.5%

## Historical Closed Sales by Month



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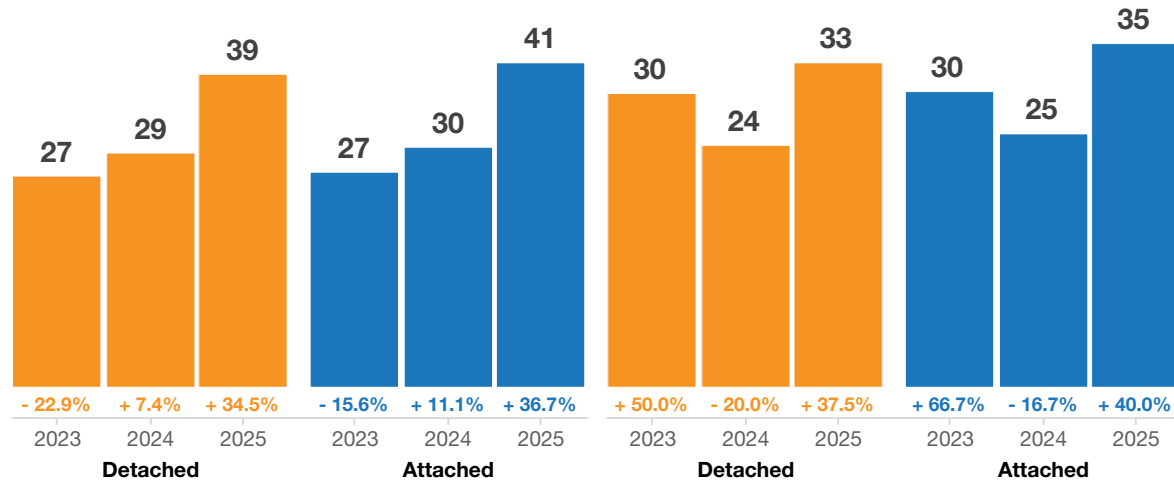
# Days on Market Until Sale

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



## October

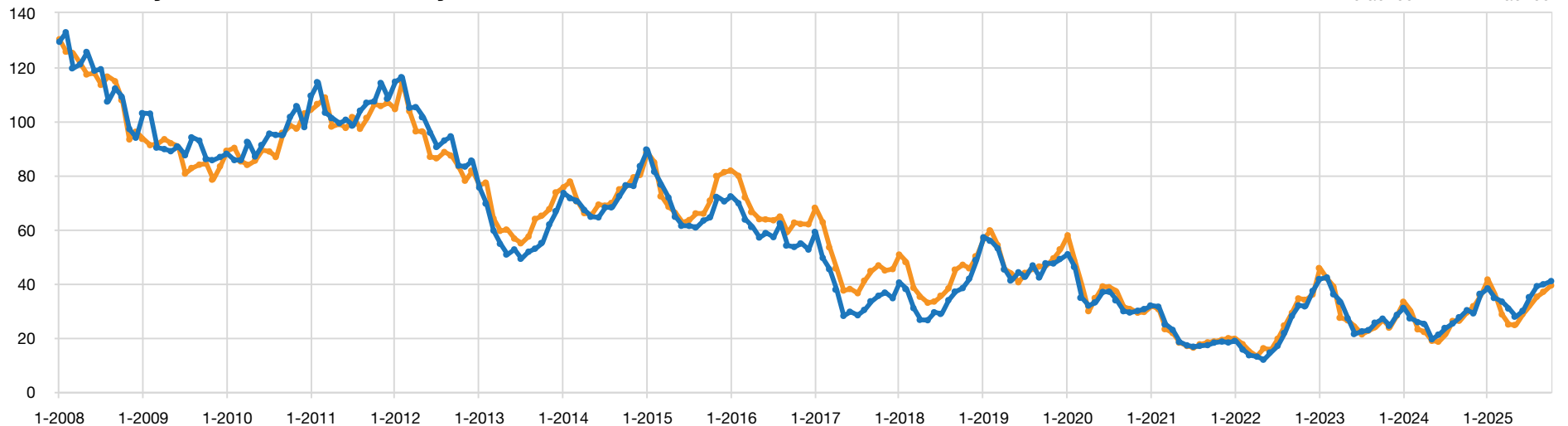
## Year to Date



Days on Market	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Nov-2024	32	+ 33.3%	29	+ 20.8%
Dec-2024	36	+ 28.6%	36	+ 28.6%
Jan-2025	42	+ 27.3%	38	+ 22.6%
Feb-2025	36	+ 20.0%	35	+ 29.6%
Mar-2025	29	+ 26.1%	33	+ 26.9%
Apr-2025	25	+ 13.6%	31	+ 24.0%
May-2025	25	+ 31.6%	28	+ 47.4%
Jun-2025	29	+ 52.6%	30	+ 42.9%
Jul-2025	32	+ 52.4%	35	+ 45.8%
Aug-2025	35	+ 34.6%	39	+ 56.0%
Sep-2025	37	+ 42.3%	40	+ 42.9%
<b>Oct-2025</b>	<b>39</b>	<b>+ 34.5%</b>	<b>41</b>	<b>+ 36.7%</b>
12-Month Avg*	33	+ 33.6%	35	+ 35.7%

\* Days on Market for all properties from November 2024 through October 2025. This is not the average of the individual figures above.

## Historical Days on Market Until Sale by Month



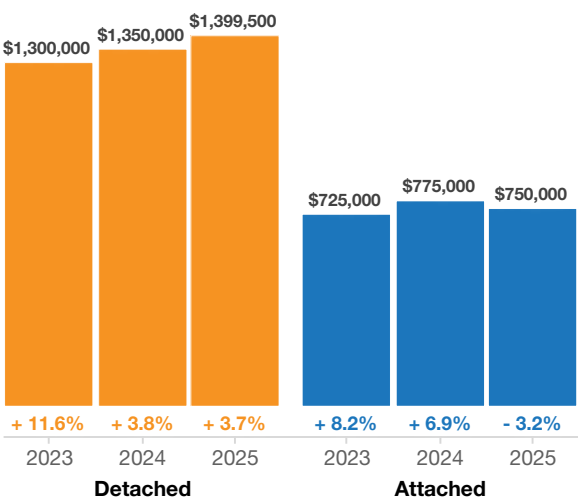
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# Median Sales Price

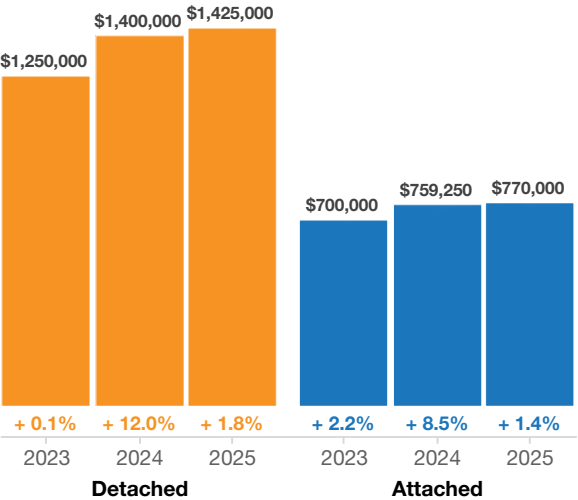
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



## October



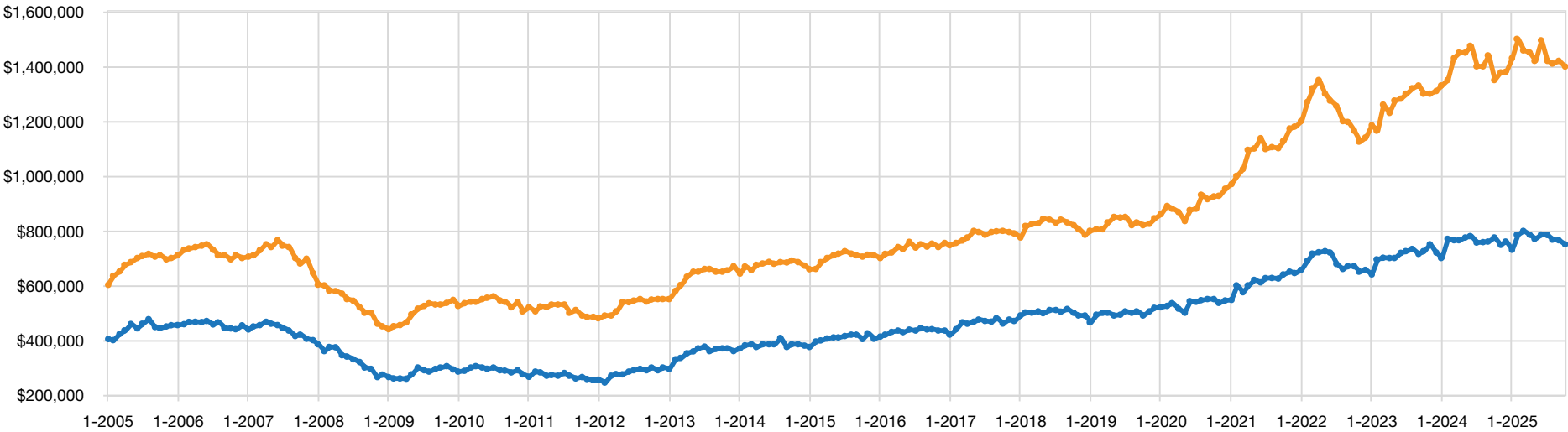
## Year to Date



Median Sales Price	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Nov-2024	\$1,377,777	+ 6.0%	\$748,000	- 0.3%
Dec-2024	\$1,380,000	+ 5.3%	\$760,000	+ 5.6%
Jan-2025	\$1,430,000	+ 7.5%	\$730,000	+ 4.3%
Feb-2025	\$1,500,000	+ 11.1%	\$785,000	+ 1.9%
Mar-2025	\$1,458,250	+ 2.0%	\$799,000	+ 4.4%
Apr-2025	\$1,450,000	0.0%	\$785,000	+ 2.6%
May-2025	\$1,420,000	- 2.1%	\$770,000	- 0.6%
Jun-2025	\$1,495,000	+ 1.4%	\$785,500	+ 0.7%
Jul-2025	\$1,420,000	+ 1.4%	\$784,000	+ 3.6%
Aug-2025	\$1,410,000	+ 0.7%	\$767,000	+ 1.2%
Sep-2025	\$1,420,000	- 1.4%	\$765,000	+ 0.7%
Oct-2025	\$1,399,500	+ 3.7%	\$750,000	- 3.2%
12-Month Avg*	\$1,425,000	+ 1.8%	\$770,000	+ 1.4%

\* Median Sales Price for all properties from November 2024 through October 2025. This is not the average of the individual figures above.

## Historical Median Sales Price by Month



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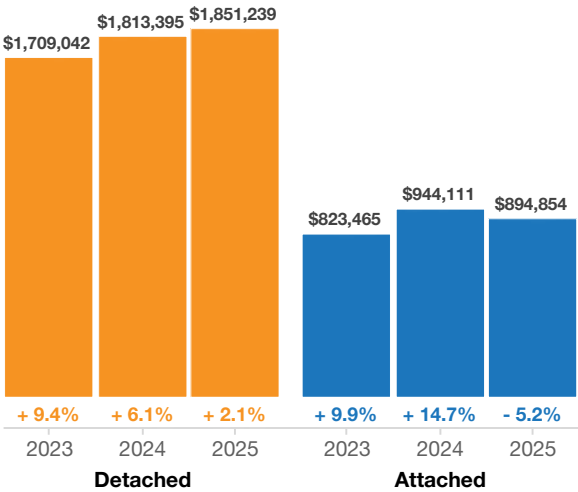


# Average Sales Price

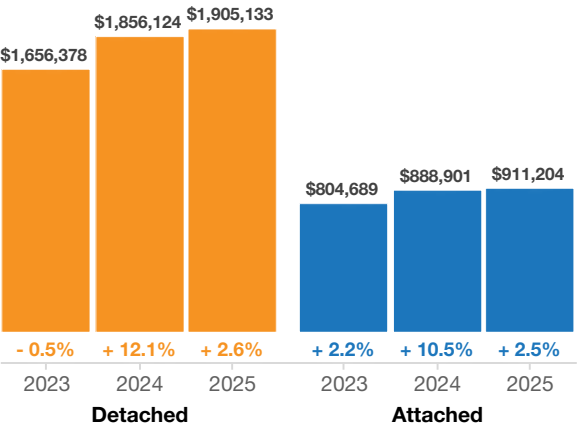
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



## October



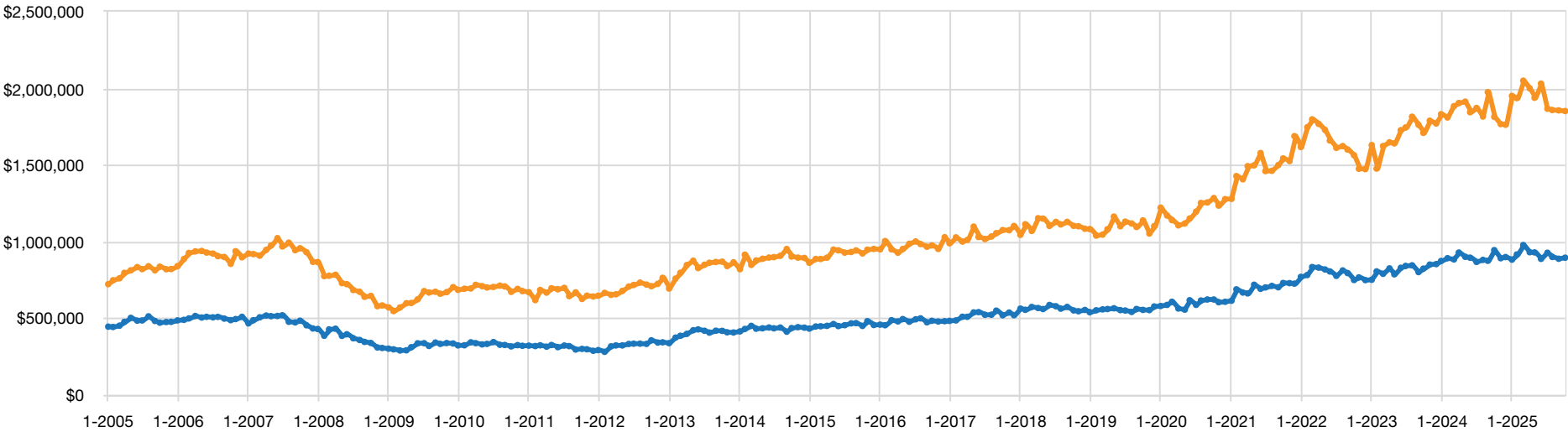
## Year to Date



Avg. Sales Price	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Nov-2024	\$1,766,255	- 1.2%	\$891,277	+ 4.9%
Dec-2024	\$1,762,001	- 0.4%	\$898,962	+ 5.4%
Jan-2025	\$1,949,651	+ 6.5%	\$882,143	+ 1.0%
Feb-2025	\$1,935,544	+ 7.0%	\$915,704	+ 2.7%
Mar-2025	\$2,049,206	+ 8.8%	\$977,318	+ 10.6%
Apr-2025	\$1,999,495	+ 5.0%	\$930,485	+ 0.2%
May-2025	\$1,937,822	+ 1.3%	\$929,327	+ 3.2%
Jun-2025	\$2,029,999	+ 10.1%	\$887,259	- 0.8%
Jul-2025	\$1,866,380	- 0.3%	\$927,084	+ 6.9%
Aug-2025	\$1,857,867	+ 2.3%	\$899,751	+ 2.2%
Sep-2025	\$1,855,559	- 6.0%	\$887,798	+ 1.5%
Oct-2025	\$1,851,239	+ 2.1%	\$894,854	- 5.2%
12-Month Avg*	\$1,905,133	+ 2.6%	\$911,204	+ 2.5%

\* Avg. Sales Price for all properties from November 2024 through October 2025. This is not the average of the individual figures above.

## Historical Average Sales Price by Month



The accuracy of all information is deemed reliable but not guaranteed and should be personally verified through personal inspection by and/or with the appropriate professionals.

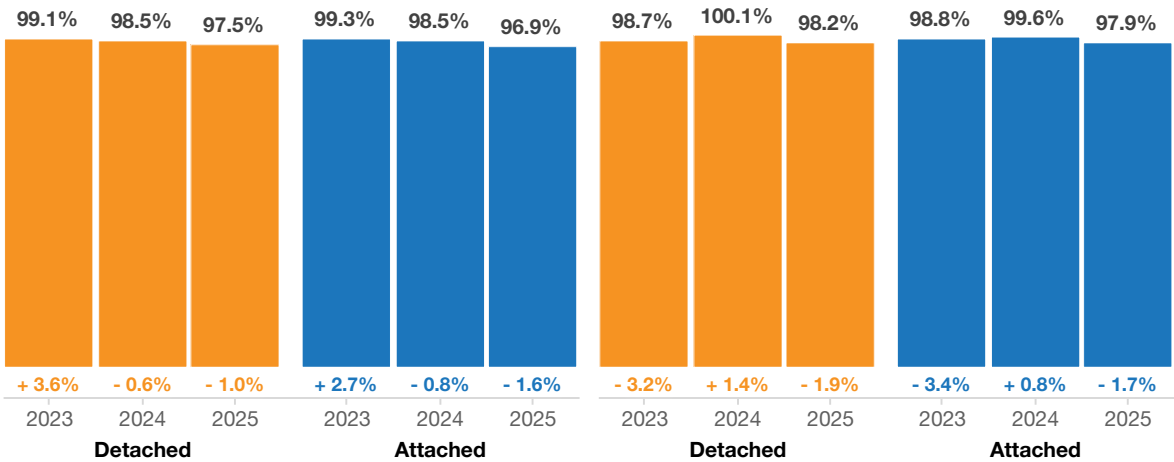
# Percent of Original List Price Received

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.



## October

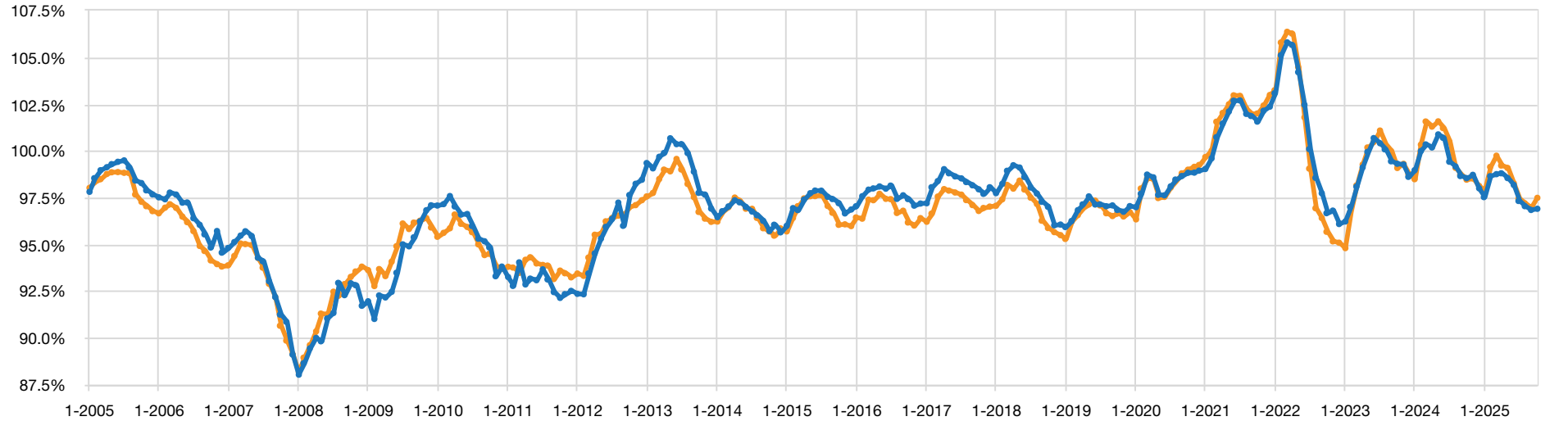
## Year to Date



Pct. of Orig. Price Received	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Nov-2024	98.5%	- 0.8%	98.7%	- 0.6%
Dec-2024	98.1%	- 0.7%	98.0%	- 0.6%
Jan-2025	97.9%	- 0.6%	97.5%	- 1.5%
Feb-2025	99.1%	- 1.2%	98.6%	- 1.4%
Mar-2025	99.7%	- 1.9%	98.8%	- 1.5%
Apr-2025	99.2%	- 2.1%	98.8%	- 1.4%
May-2025	99.1%	- 2.5%	98.5%	- 2.4%
Jun-2025	98.3%	- 2.9%	98.2%	- 2.5%
Jul-2025	97.4%	- 3.1%	97.3%	- 2.1%
Aug-2025	97.2%	- 1.9%	97.0%	- 2.2%
Sep-2025	97.0%	- 1.7%	96.8%	- 1.9%
Oct-2025	97.5%	- 1.0%	96.9%	- 1.6%
12-Month Avg*	98.2%	- 1.8%	97.9%	- 1.7%

\* Pct. of Orig. Price Received for all properties from November 2024 through October 2025. This is not the average of the individual figures above.

## Historical Percent of Original List Price Received by Month



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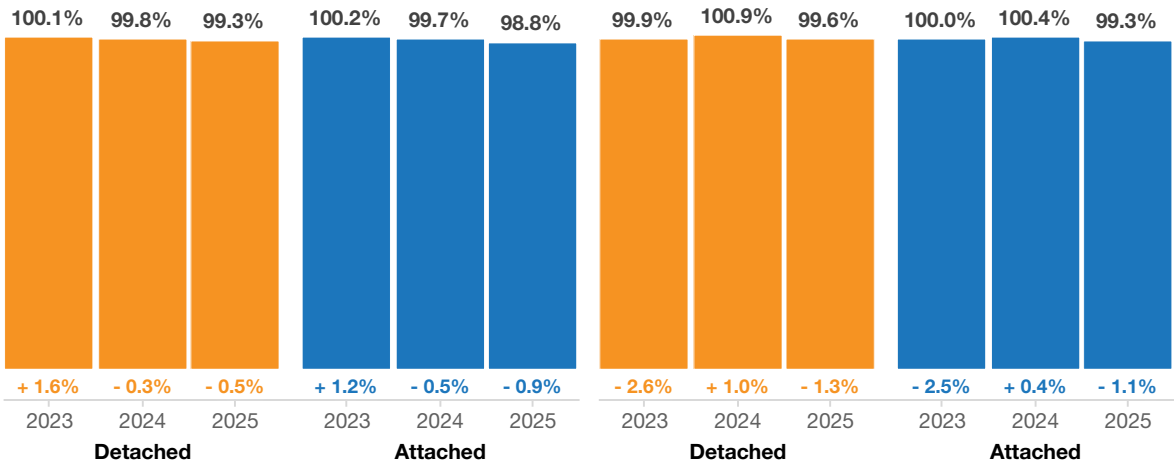
# Percent of List Price Received

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



## October

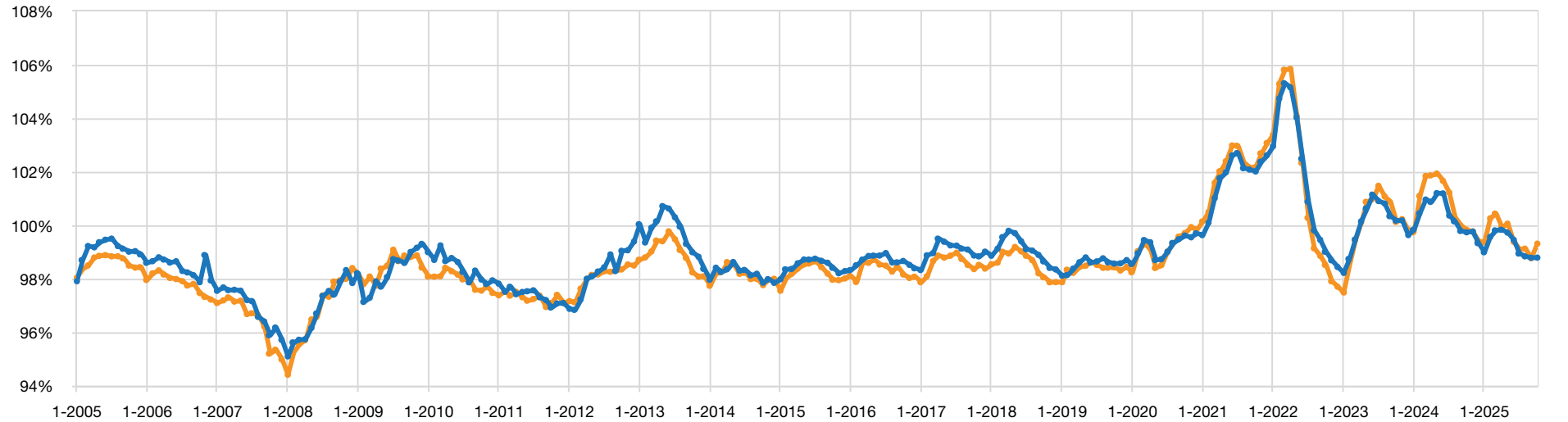
## Year to Date



Pct. of List Price Received	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Nov-2024	99.8%	- 0.4%	99.8%	- 0.4%
Dec-2024	99.4%	- 0.4%	99.3%	- 0.3%
Jan-2025	99.4%	- 0.3%	99.0%	- 0.8%
Feb-2025	100.3%	- 0.8%	99.6%	- 0.8%
Mar-2025	100.4%	- 1.4%	99.8%	- 1.2%
Apr-2025	99.9%	- 2.0%	99.8%	- 1.1%
May-2025	100.1%	- 1.8%	99.7%	- 1.5%
Jun-2025	99.4%	- 2.3%	99.5%	- 1.7%
Jul-2025	99.1%	- 2.1%	98.9%	- 1.5%
Aug-2025	99.1%	- 1.2%	98.8%	- 1.3%
Sep-2025	98.8%	- 1.2%	98.8%	- 1.0%
Oct-2025	99.3%	- 0.5%	98.8%	- 0.9%
12-Month Avg*	99.6%	- 1.3%	99.3%	- 1.1%

\* Pct. of List Price Received for all properties from November 2024 through October 2025. This is not the average of the individual figures above.

## Historical Percent of List Price Received by Month



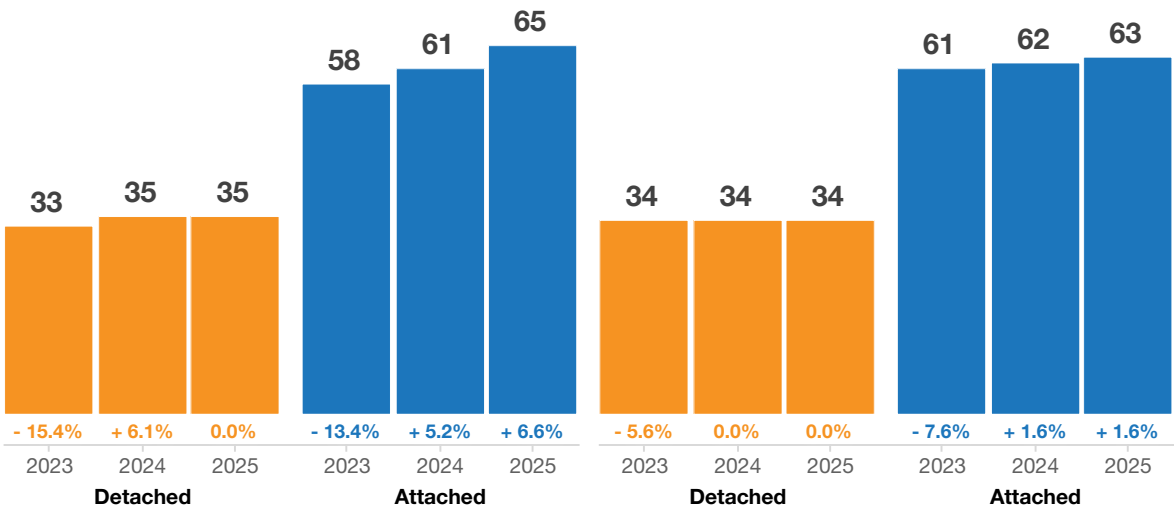
# Housing Affordability Index

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



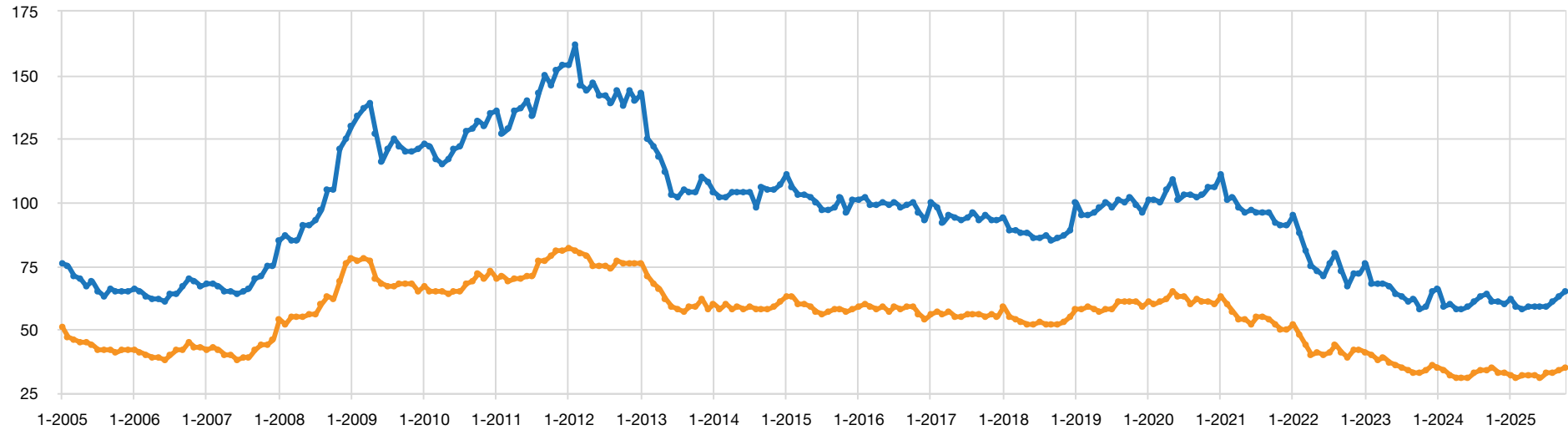
## October

## Year to Date



Affordability Index	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Nov-2024	33	- 2.9%	61	+ 3.4%
Dec-2024	33	- 8.3%	60	- 7.7%
Jan-2025	32	- 8.6%	62	- 6.1%
Feb-2025	31	- 8.8%	59	0.0%
Mar-2025	32	0.0%	58	- 3.3%
Apr-2025	32	+ 3.2%	59	+ 1.7%
May-2025	32	+ 3.2%	59	+ 1.7%
Jun-2025	31	0.0%	59	0.0%
Jul-2025	33	0.0%	59	- 3.3%
Aug-2025	33	- 2.9%	61	- 3.2%
Sep-2025	34	0.0%	63	- 1.6%
Oct-2025	35	0.0%	65	+ 6.6%
12-Month Avg	33	0.0%	60	- 1.6%

## Historical Housing Affordability Index by Month



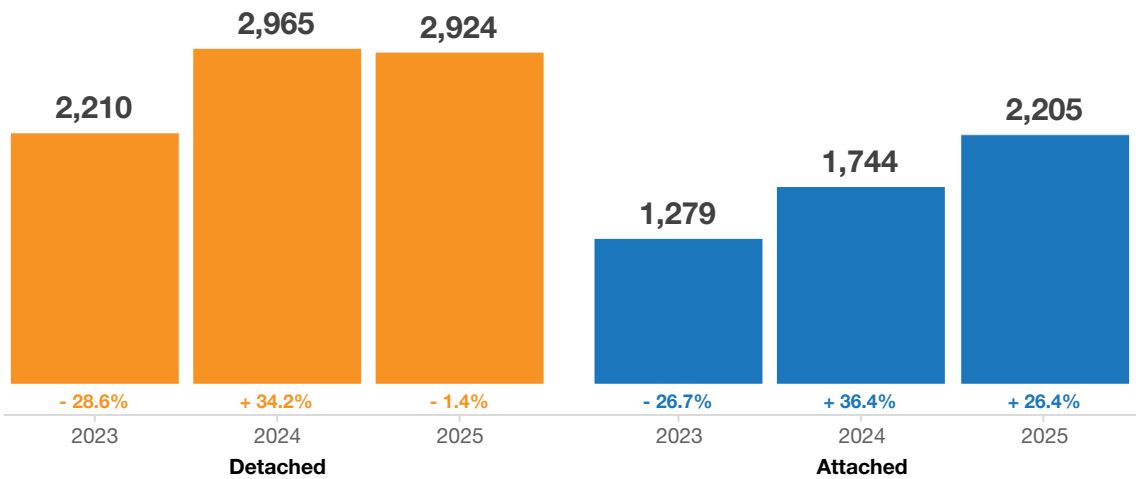
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# Inventory of Homes for Sale

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

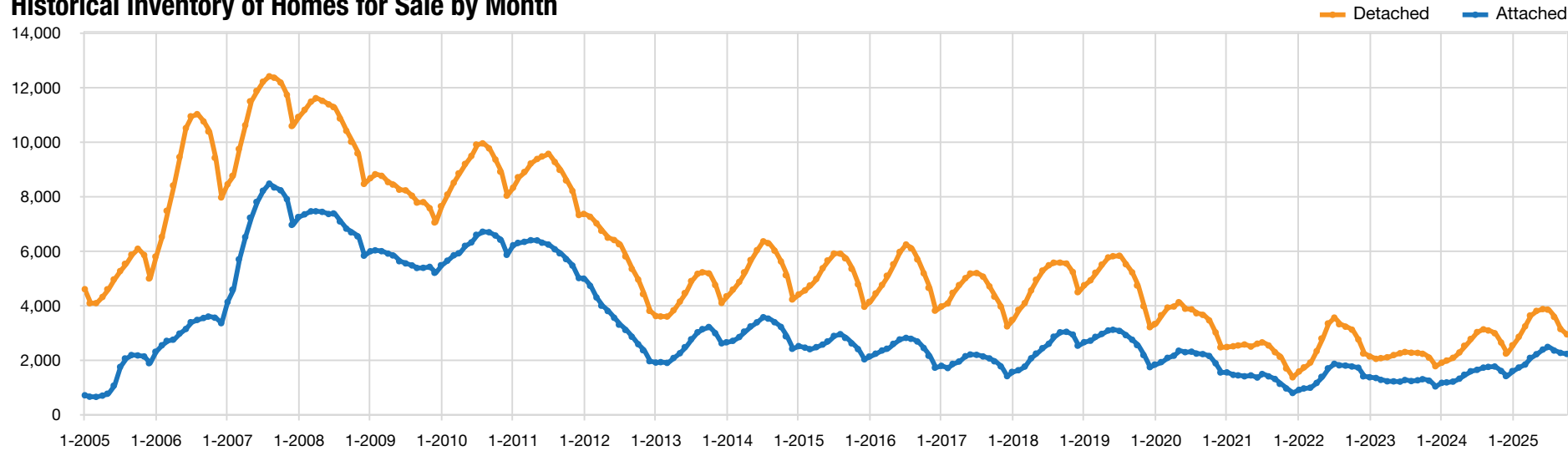


## October



Homes for Sale	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Nov-2024	2,623	+ 26.7%	1,581	+ 29.2%
Dec-2024	2,219	+ 26.4%	1,393	+ 37.4%
Jan-2025	2,523	+ 33.8%	1,576	+ 37.5%
Feb-2025	2,833	+ 44.4%	1,706	+ 46.9%
Mar-2025	3,219	+ 56.0%	1,816	+ 52.6%
Apr-2025	3,615	+ 60.0%	2,060	+ 58.7%
May-2025	3,784	+ 51.1%	2,195	+ 52.2%
Jun-2025	3,851	+ 39.8%	2,367	+ 50.8%
Jul-2025	3,831	+ 27.4%	2,462	+ 51.8%
Aug-2025	3,566	+ 14.8%	2,330	+ 36.7%
Sep-2025	3,118	+ 1.7%	2,244	+ 29.7%
Oct-2025	2,924	- 1.4%	2,205	+ 26.4%
12-Month Avg	3,176	+ 29.6%	1,995	+ 42.1%

## Historical Inventory of Homes for Sale by Month



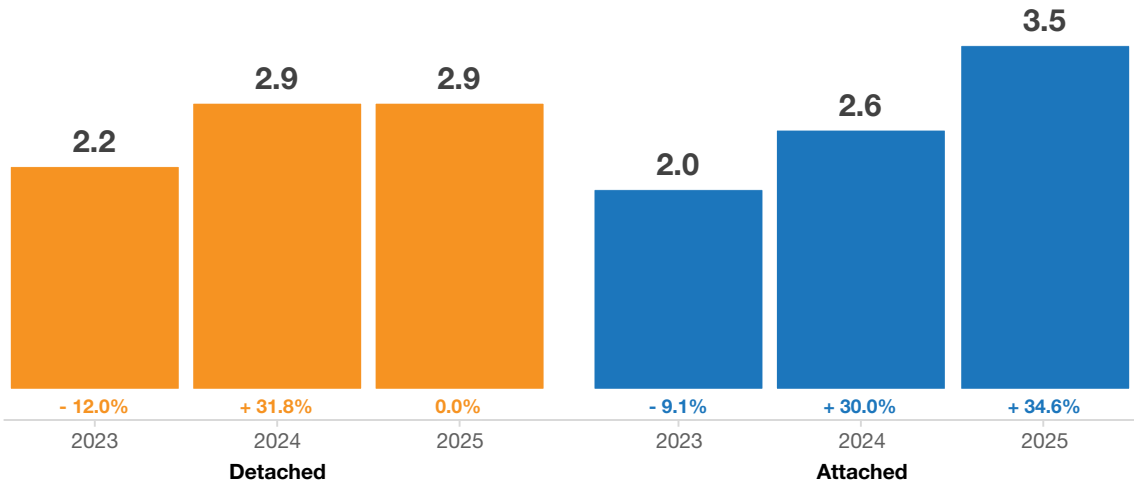
The accuracy of all information is deemed reliable but not guaranteed and should be personally verified through personal inspection by and/or with the appropriate professionals.

# 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.



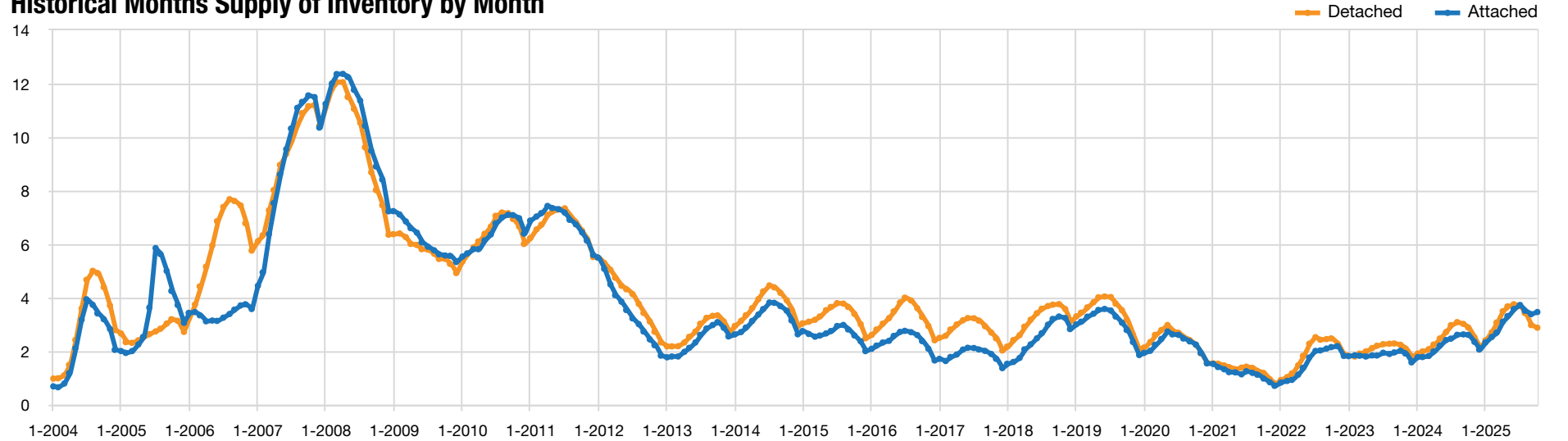
## October



Months Supply	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Nov-2024	2.5	+ 19.0%	2.4	+ 26.3%
Dec-2024	2.1	+ 16.7%	2.1	+ 31.3%
Jan-2025	2.4	+ 26.3%	2.3	+ 27.8%
Feb-2025	2.7	+ 35.0%	2.5	+ 38.9%
Mar-2025	3.1	+ 47.6%	2.7	+ 50.0%
Apr-2025	3.5	+ 59.1%	3.1	+ 55.0%
May-2025	3.7	+ 48.0%	3.3	+ 50.0%
Jun-2025	3.8	+ 40.7%	3.6	+ 50.0%
Jul-2025	3.7	+ 23.3%	3.7	+ 48.0%
Aug-2025	3.4	+ 9.7%	3.5	+ 34.6%
Sep-2025	3.0	0.0%	3.4	+ 30.8%
Oct-2025	2.9	0.0%	3.5	+ 34.6%
12-Month Avg*	3.1	+ 25.4%	3.0	+ 39.5%

\* Months Supply for all properties from November 2024 through October 2025. This is not the average of the individual figures above.

## Historical Months Supply of Inventory by Month



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# All Properties

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



Key Metrics	Historical Sparkbars	10-2024	10-2025	% Change	YTD 2024	YTD 2025	% Change
New Listings		2,279	1,916	- 15.9%	26,688	28,713	+ 7.6%
Pending Sales		1,788	1,063	- 40.5%	20,633	20,023	- 3.0%
Closed Sales		1,844	1,920	+ 4.1%	20,410	20,806	+ 1.9%
Days on Market Until Sale		30	40	+ 33.3%	25	34	+ 36.0%
Median Sales Price		\$1,150,000	\$1,185,000	+ 3.0%	\$1,150,000	\$1,185,000	+ 3.0%
Average Sales Price		\$1,467,324	\$1,494,559	+ 1.9%	\$1,476,356	\$1,521,357	+ 3.0%
Pct. of Orig. Price Received		98.5%	97.3%	- 1.2%	99.9%	98.1%	- 1.8%
Percent of List Price Received		99.8%	99.1%	- 0.7%	100.7%	99.5%	- 1.2%
Housing Affordability Index		41	41	0.0%	41	41	0.0%
Inventory of Homes for Sale		4,801	5,133	+ 6.9%	—	—	—
Months Supply of Inventory		2.8	3.1	+ 10.7%	—	—	—

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