

Monthly Indicators



January 2026

U.S. existing-home sales climbed 5.1% month-over-month and 1.4% year-over-year to a seasonally adjusted annual rate of 4.35 million units, the strongest pace in nearly three years, according to the National Association of REALTORS® (NAR). Lower mortgage rates and slower home price growth helped spur buyer activity, and sales increased month-over-month in every region. On an annual basis, sales rose in the South, held steady in the West and Midwest, and declined in the Northeast.

New Listings decreased 25.3 percent for Detached homes and 6.1 percent for Attached homes. Pending Sales decreased 43.8 percent for Detached homes and 47.5 percent for Attached homes. Inventory decreased 14.2 percent for Detached homes but increased 16.0 percent for Attached homes.

Median Sales Price decreased 0.7 percent to \$1,420,000 for Detached homes but increased 4.1 percent to \$759,000 for Attached homes. Days on Market increased 14.3 percent for Detached homes and 39.5 percent for Attached homes. Months Supply of Inventory decreased 12.5 percent for Detached homes but increased 26.1 percent for Attached homes.

Nationally, there were 1.18 million homes for sale heading into January, an 18.1% decline from the previous month but 3.5% higher compared to the same period last year, representing a 3.3-month supply at the current sales pace, according to NAR. Meanwhile, the median existing-home price rose 0.4% from a year ago to \$405,400, reflecting a continued moderation in national price growth.

Monthly Snapshot

- 0.7%

Change in Number of
Median Sales Price
Detached

+ 4.1%

Change in Number of
Median Sales Price
Attached

+ 0.9%

Change in Number of
Median Sales Price
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 a rolling 12-month view of activity. Detached properties only.



Key Metrics	Historical Sparkbars	1-2025	1-2026	% Change	YTD 2025	YTD 2026	% Change
New Listings		1,529	1,142	- 25.3%	16,545	17,172	+ 3.8%
Pending Sales		907	510	- 43.8%	12,572	12,195	- 3.0%
Closed Sales		768	737	- 4.0%	12,580	12,576	- 0.0%
Days on Market Until Sale		42	48	+ 14.3%	26	34	+ 30.8%
Median Sales Price		\$1,430,000	\$1,420,000	- 0.7%	\$1,405,000	\$1,430,000	+ 1.8%
Average Sales Price		\$1,949,651	\$2,133,728	+ 9.4%	\$1,859,072	\$1,933,712	+ 4.0%
Pct. of Orig. Price Received		97.9%	97.0%	- 0.9%	99.9%	98.0%	- 1.9%
Percent of List Price Received		99.4%	98.8%	- 0.6%	100.8%	99.4%	- 1.4%
Housing Affordability Index		33	36	+ 9.1%	34	35	+ 2.9%
Inventory of Homes for Sale		2,546	2,184	- 14.2%	—	—	—
Months Supply of Inventory		2.4	2.1	- 12.5%	—	—	—

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 a rolling 12-month view of activity. Attached properties only.



Key Metrics	Historical Sparkbars	1-2025	1-2026	% Change	YTD 2025	YTD 2026	% Change
New Listings		974	915	- 6.1%	10,439	11,187	+ 7.2%
Pending Sales		611	321	- 47.5%	8,123	7,611	- 6.3%
Closed Sales		476	475	- 0.2%	8,074	7,949	- 1.5%
Days on Market Until Sale		38	53	+ 39.5%	27	37	+ 37.0%
Median Sales Price		\$729,250	\$759,000	+ 4.1%	\$760,000	\$775,000	+ 2.0%
Average Sales Price		\$880,773	\$907,642	+ 3.1%	\$895,228	\$916,758	+ 2.4%
Pct. of Orig. Price Received		97.5%	96.3%	- 1.2%	99.4%	97.6%	- 1.8%
Percent of List Price Received		99.0%	98.3%	- 0.7%	100.3%	99.2%	- 1.1%
Housing Affordability Index		65	67	+ 3.1%	62	65	+ 4.8%
Inventory of Homes for Sale		1,583	1,837	+ 16.0%	—	—	—
Months Supply of Inventory		2.3	2.9	+ 26.1%	—	—	—

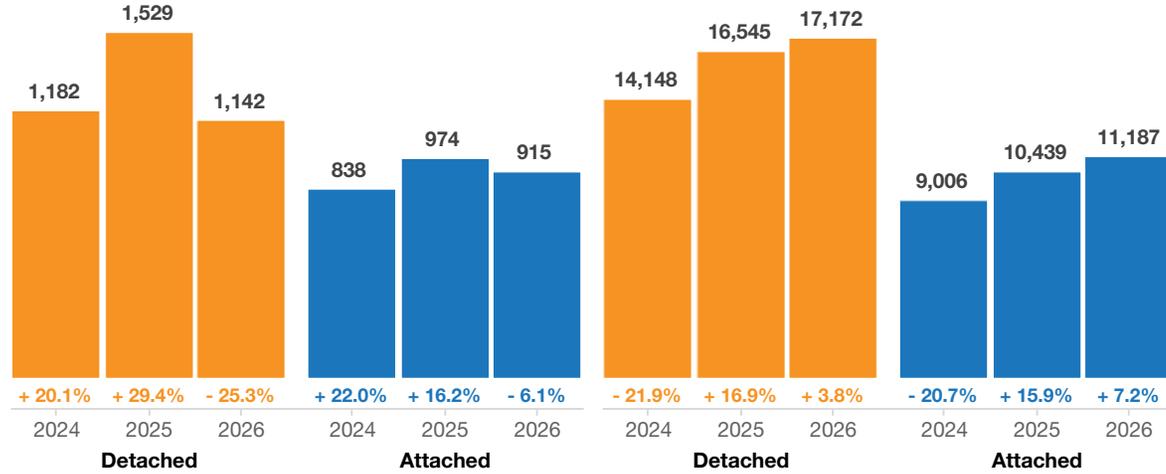
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New Listings

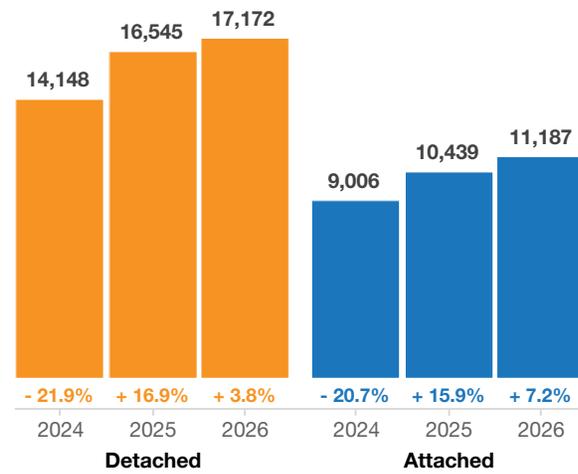
A count of the properties that have been newly listed on the market in a given month.



January

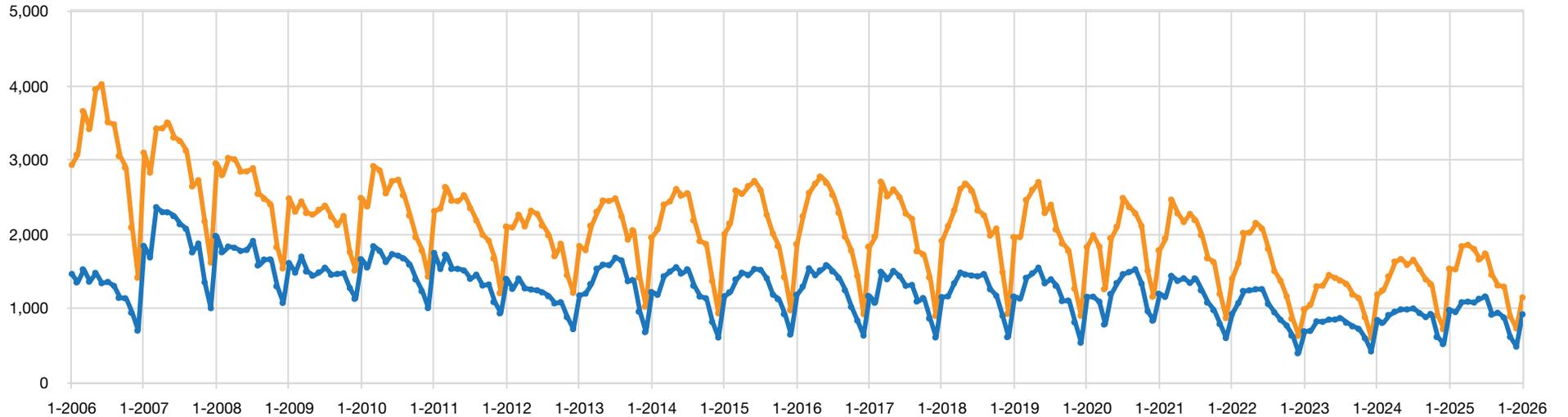


Year to Date



New Listings	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Feb-2025	1,521	+23.1%	946	+18.3%
Mar-2025	1,831	+28.5%	1,077	+19.0%
Apr-2025	1,849	+13.8%	1,085	+14.2%
May-2025	1,792	+8.1%	1,074	+9.5%
Jun-2025	1,652	+4.5%	1,124	+14.6%
Jul-2025	1,733	+5.2%	1,155	+16.2%
Aug-2025	1,447	-4.7%	911	-2.3%
Sep-2025	1,304	-5.8%	936	+6.6%
Oct-2025	1,287	-2.6%	871	-5.2%
Nov-2025	887	-1.7%	612	+0.3%
Dec-2025	727	+1.5%	481	-6.6%
Jan-2026	1,142	-25.3%	915	-6.1%
12-Month Avg	1,431	+3.8%	932	+7.1%

Historical New Listings by Month



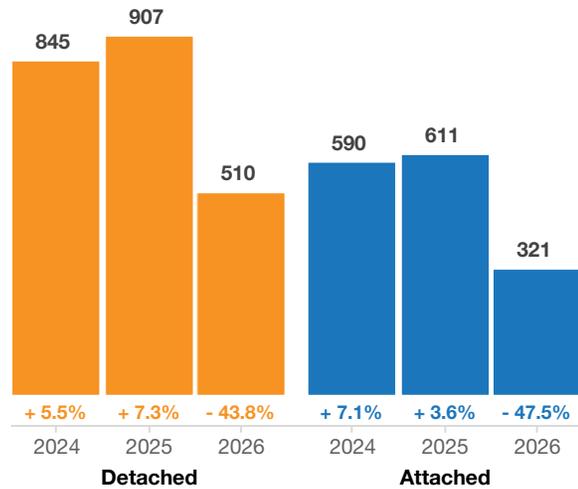
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Pending Sales

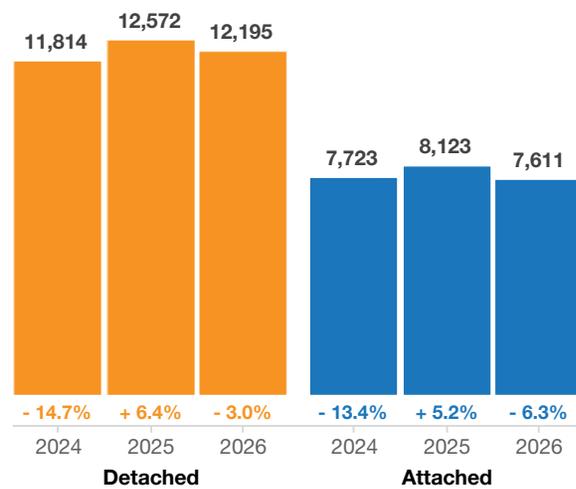
A count of the properties on which offers have been accepted in a given month.



January

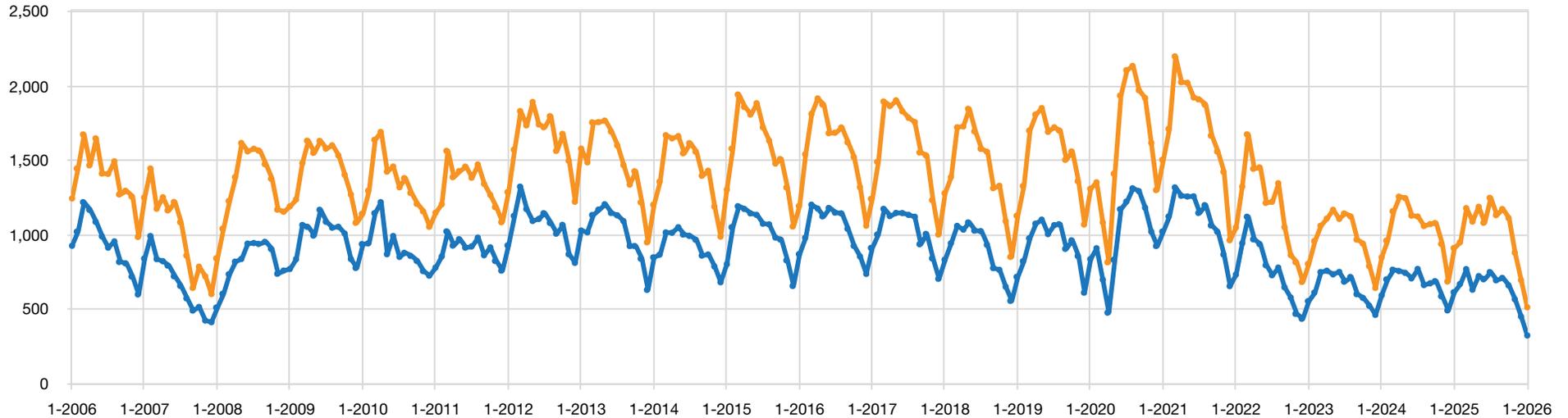


Year to Date



Pending Sales	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Feb-2025	946	- 1.1%	666	- 4.4%
Mar-2025	1,175	+ 1.8%	766	+ 0.5%
Apr-2025	1,085	- 13.3%	628	- 16.6%
May-2025	1,184	- 4.7%	719	- 3.0%
Jun-2025	1,077	- 4.3%	698	- 0.9%
Jul-2025	1,244	+ 11.2%	746	- 2.7%
Aug-2025	1,128	+ 6.9%	691	+ 4.9%
Sep-2025	1,169	+ 9.5%	707	+ 5.4%
Oct-2025	1,109	+ 3.2%	657	- 4.1%
Nov-2025	876	- 6.3%	564	- 3.4%
Dec-2025	692	+ 1.3%	448	- 8.4%
Jan-2026	510	- 43.8%	321	- 47.5%
12-Month Avg	1,016	- 3.1%	634	- 6.4%

Historical Pending Sales by Month



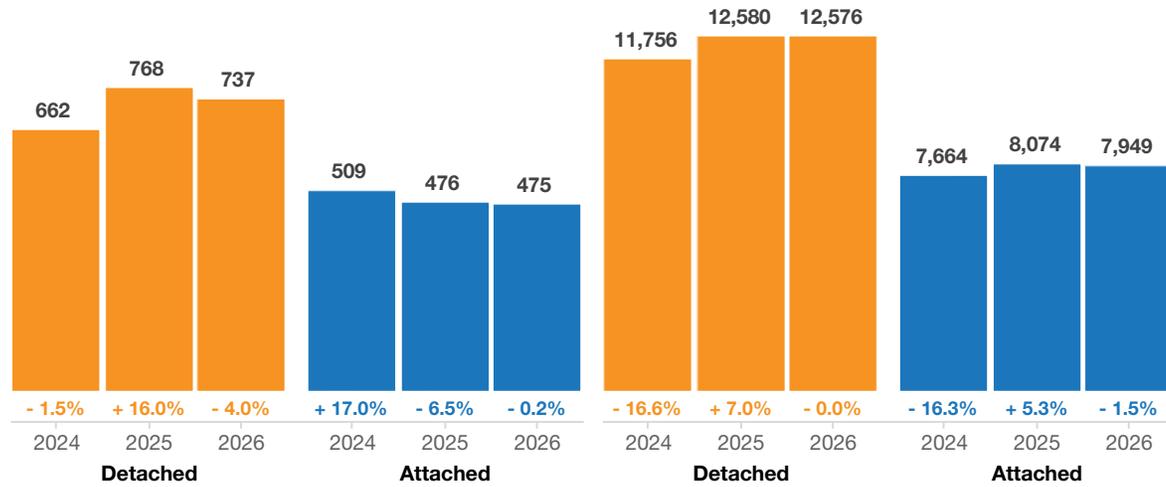
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Closed Sales

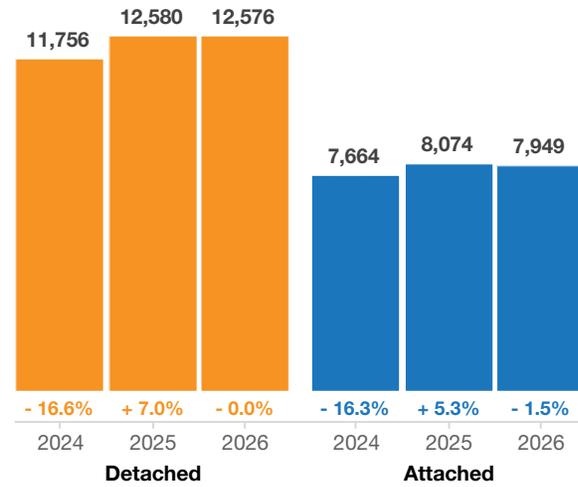
A count of the actual sales that closed in a given month.



January

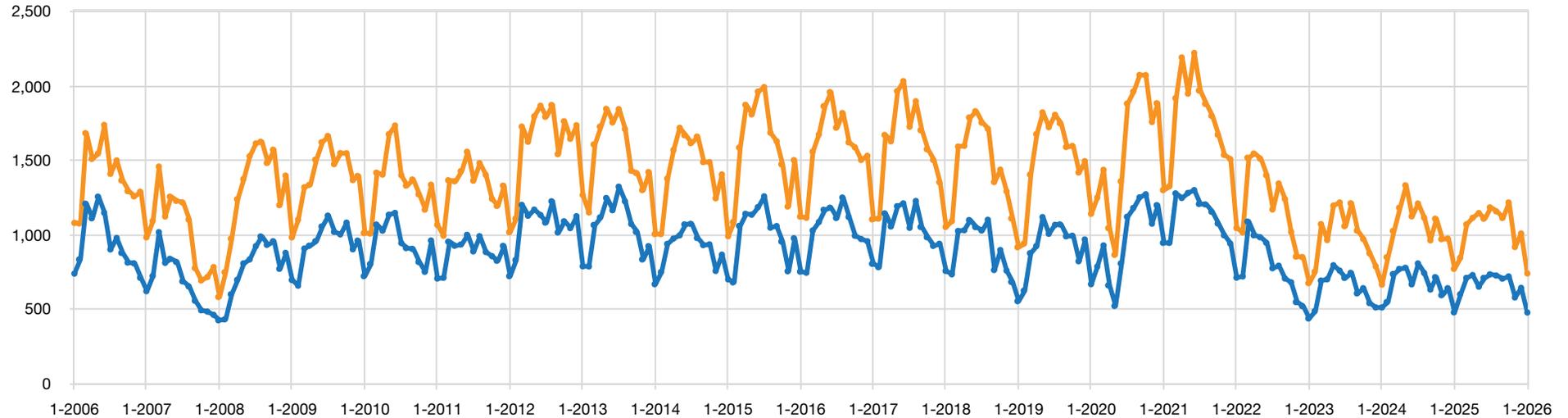


Year to Date



Closed Sales	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Feb-2025	842	-0.5%	597	+9.5%
Mar-2025	1,066	+4.3%	707	-3.5%
Apr-2025	1,110	-5.8%	726	-5.3%
May-2025	1,142	-14.0%	648	-16.4%
Jun-2025	1,104	-1.4%	707	+6.5%
Jul-2025	1,180	-2.2%	731	-9.1%
Aug-2025	1,154	+3.9%	723	-2.3%
Sep-2025	1,109	+15.6%	702	+11.6%
Oct-2025	1,213	+9.9%	717	+0.7%
Nov-2025	914	-5.5%	576	-2.5%
Dec-2025	1,005	+3.5%	640	+0.3%
Jan-2026	737	-4.0%	475	-0.2%
12-Month Avg	1,048	0.0%	662	-1.6%

Historical Closed Sales by Month



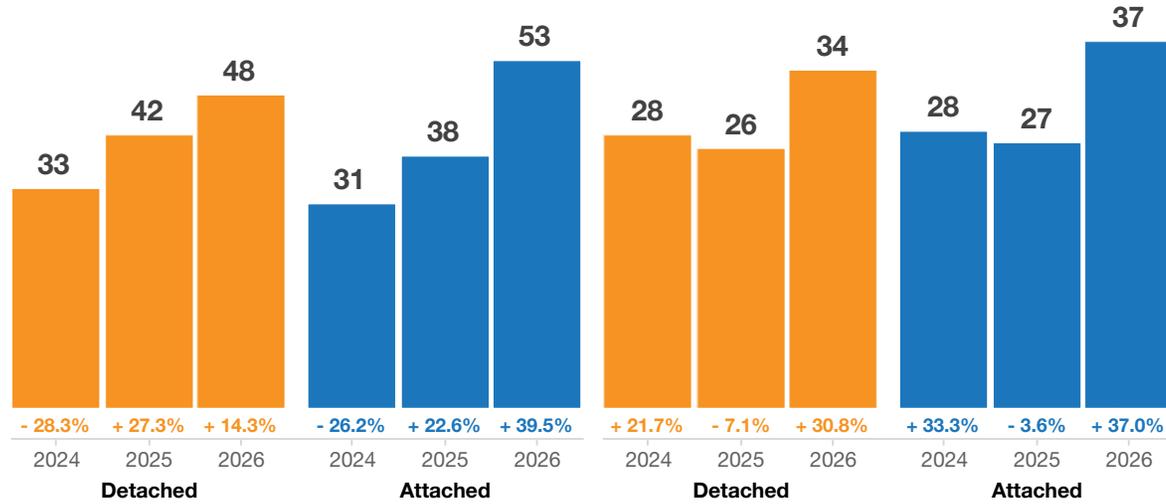
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Days on Market Until Sale

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



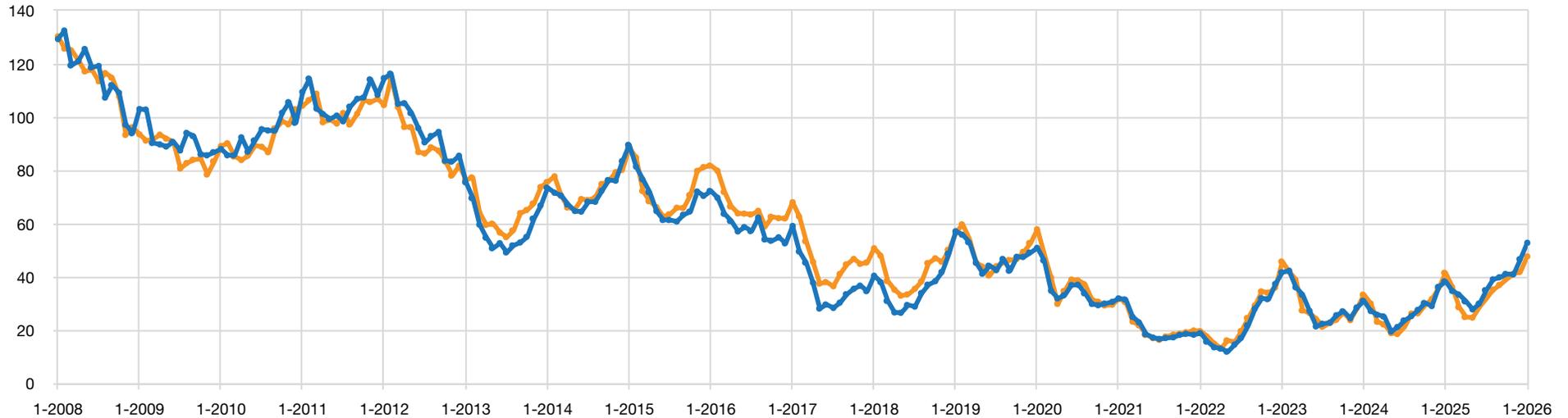
January



Days on Market	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
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%
Oct-2025	39	+ 34.5%	41	+ 36.7%
Nov-2025	41	+ 28.1%	41	+ 41.4%
Dec-2025	42	+ 16.7%	47	+ 30.6%
Jan-2026	48	+ 14.3%	53	+ 39.5%
12-Month Avg*	34	+ 30.1%	37	+ 38.3%

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

Historical Days on Market Until Sale by Month



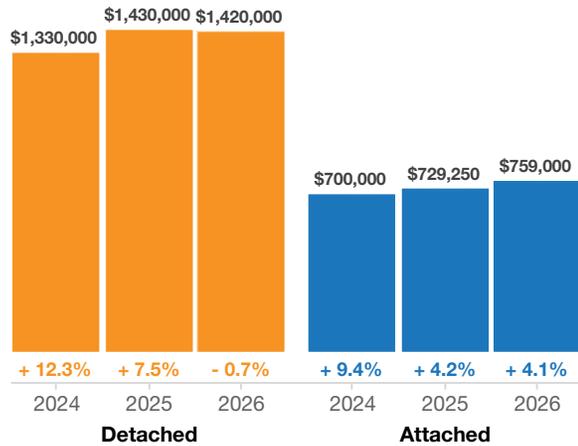
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Median Sales Price

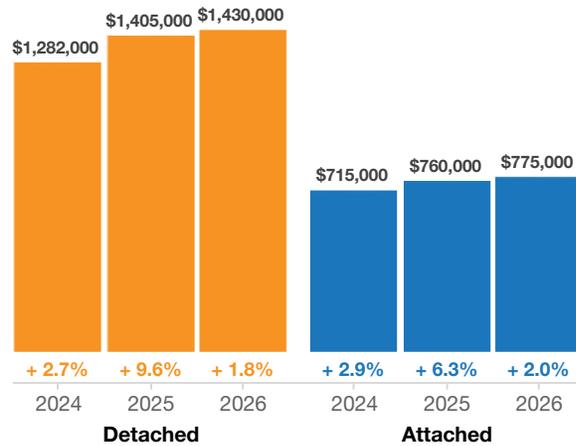
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



January



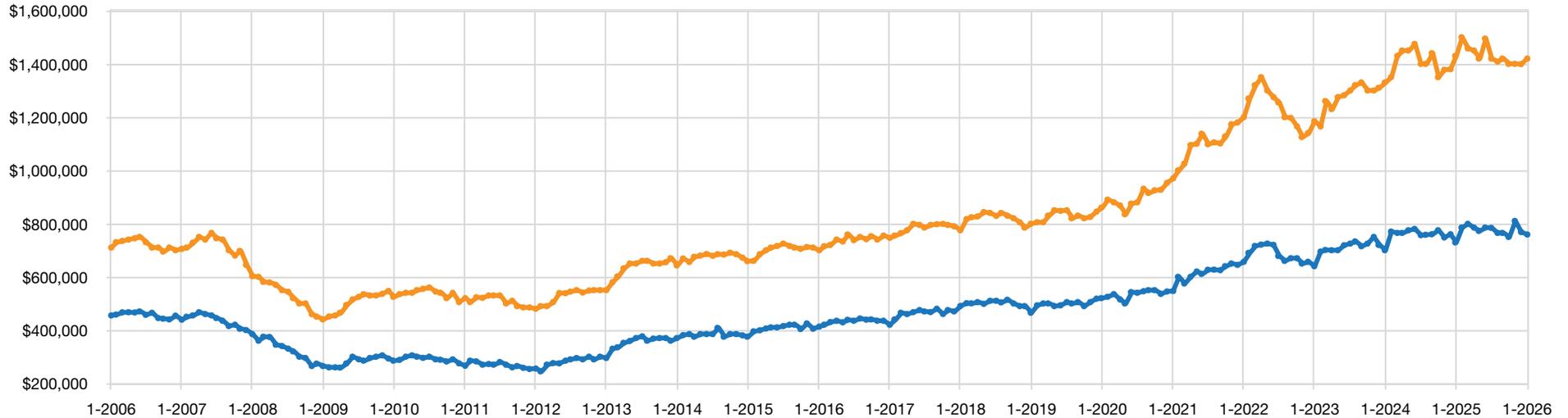
Year to Date



Median Sales Price	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
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%	\$772,500	- 0.3%
Jun-2025	\$1,495,000	+ 1.4%	\$785,000	+ 0.6%
Jul-2025	\$1,420,000	+ 1.4%	\$784,000	+ 3.6%
Aug-2025	\$1,408,500	+ 0.6%	\$765,000	+ 0.9%
Sep-2025	\$1,420,000	- 1.4%	\$765,000	+ 0.7%
Oct-2025	\$1,400,000	+ 3.7%	\$750,000	- 3.2%
Nov-2025	\$1,400,000	+ 1.6%	\$810,000	+ 8.3%
Dec-2025	\$1,399,000	+ 1.4%	\$768,500	+ 1.1%
Jan-2026	\$1,420,000	- 0.7%	\$759,000	+ 4.1%
12-Month Avg*	\$1,430,000	+ 1.8%	\$775,000	+ 2.0%

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

Historical Median Sales Price by Month



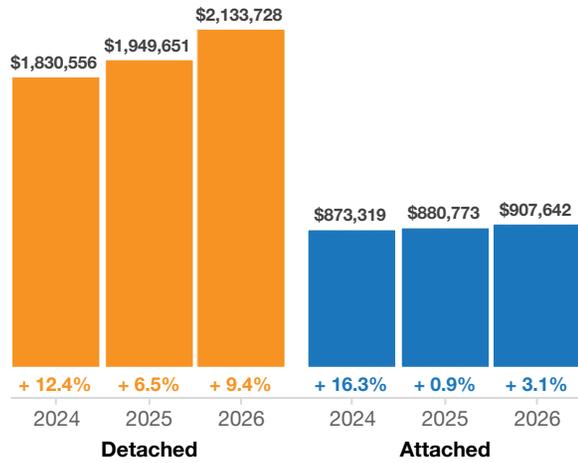
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Average Sales Price

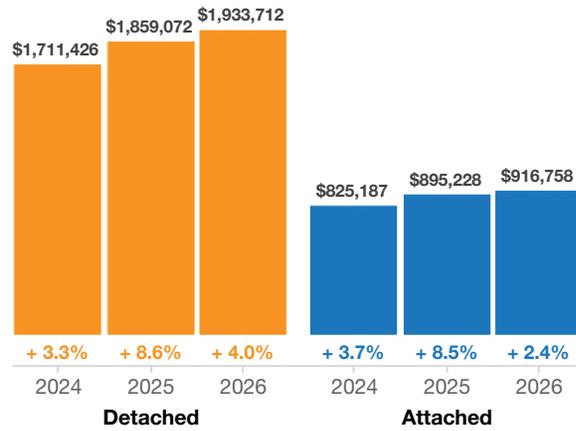
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



January



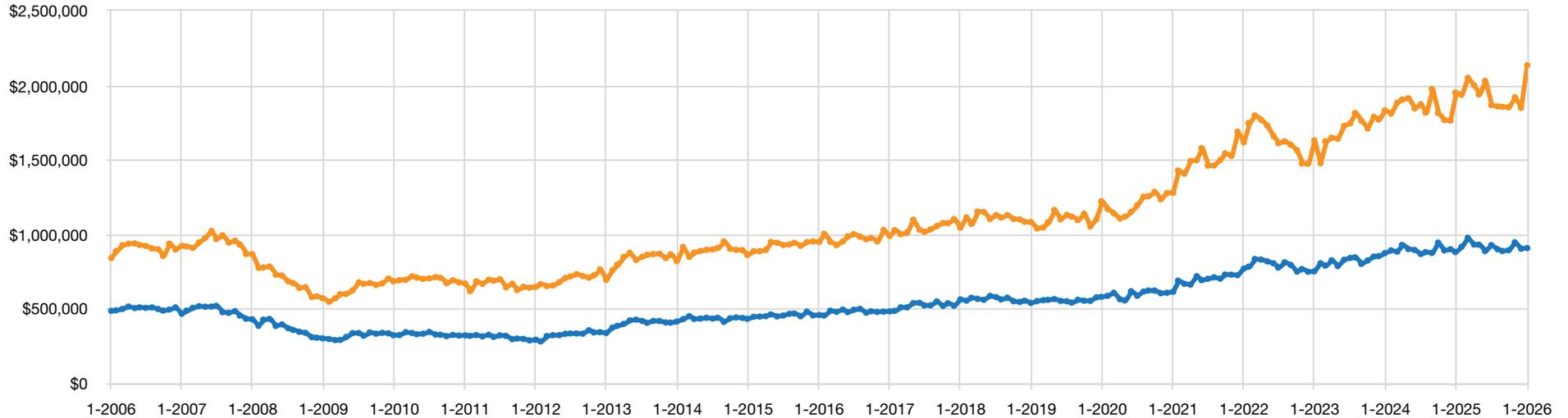
Year to Date



Avg. Sales Price	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Feb-2025	\$1,935,544	+ 7.0%	\$915,704	+ 2.7%
Mar-2025	\$2,049,206	+ 8.8%	\$976,331	+ 10.5%
Apr-2025	\$1,999,495	+ 5.0%	\$930,485	+ 0.2%
May-2025	\$1,937,822	+ 1.3%	\$929,789	+ 3.3%
Jun-2025	\$2,029,333	+ 10.1%	\$886,895	- 0.9%
Jul-2025	\$1,866,088	- 0.3%	\$927,084	+ 6.9%
Aug-2025	\$1,857,180	+ 2.3%	\$899,508	+ 2.2%
Sep-2025	\$1,854,780	- 6.0%	\$887,551	+ 1.5%
Oct-2025	\$1,851,779	+ 2.1%	\$892,760	- 5.4%
Nov-2025	\$1,919,180	+ 8.7%	\$945,979	+ 6.1%
Dec-2025	\$1,847,480	+ 4.9%	\$903,238	+ 0.5%
Jan-2026	\$2,133,728	+ 9.4%	\$907,642	+ 3.1%
12-Month Avg*	\$1,933,712	+ 4.0%	\$916,758	+ 2.4%

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

Historical Average Sales Price by Month



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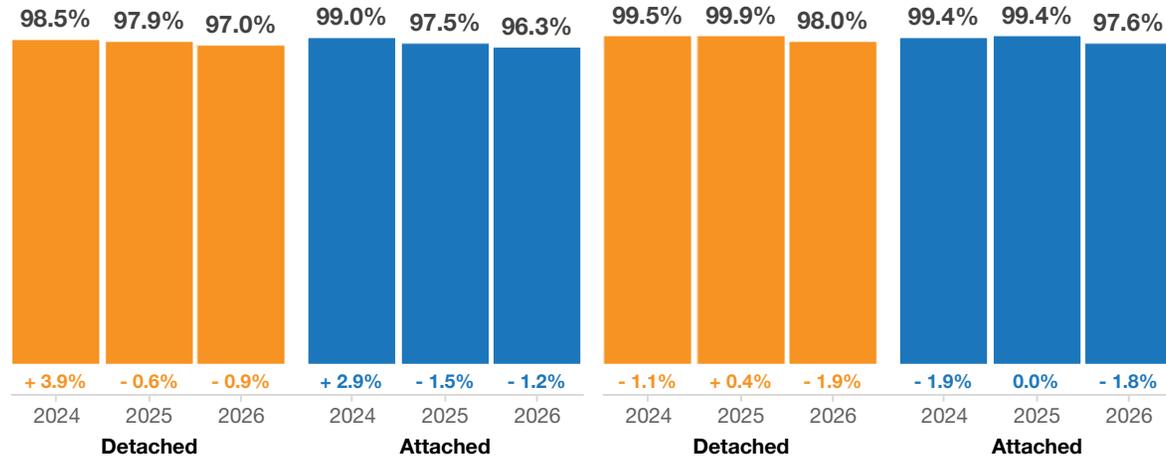
Percent of Original List Price Received

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.



January

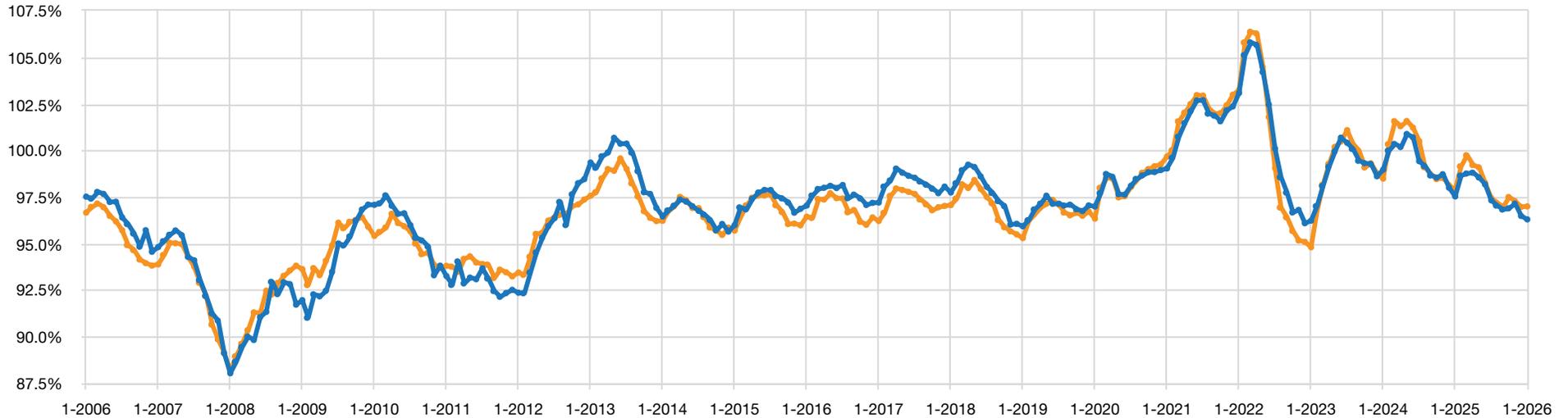
Year to Date



Pct. of Orig. Price Received	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
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%
Nov-2025	97.3%	-1.2%	97.1%	-1.6%
Dec-2025	97.0%	-1.1%	96.5%	-1.5%
Jan-2026	97.0%	-0.9%	96.3%	-1.2%
12-Month Avg*	98.0%	-1.9%	97.6%	-1.8%

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

Historical Percent of Original List Price Received by Month



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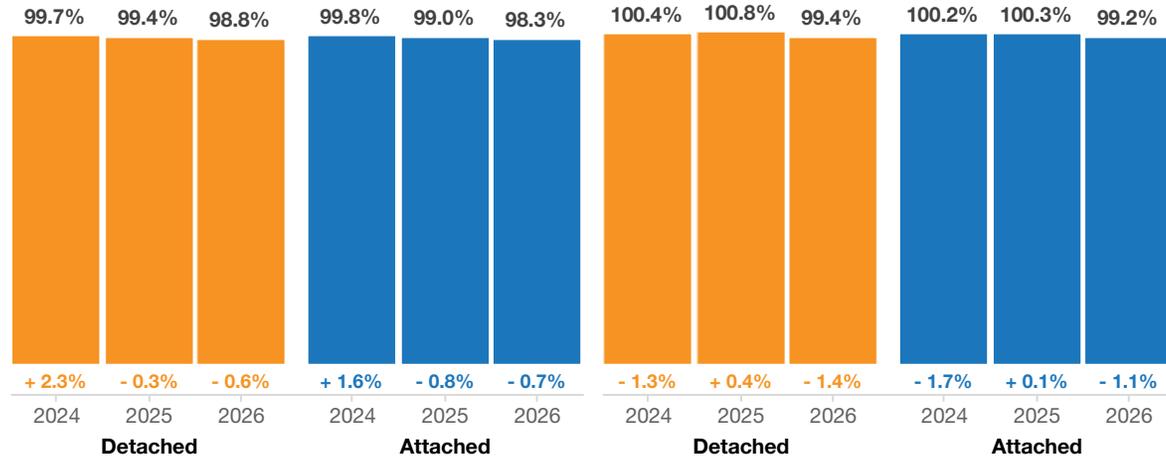
Percent of List Price Received

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.



January

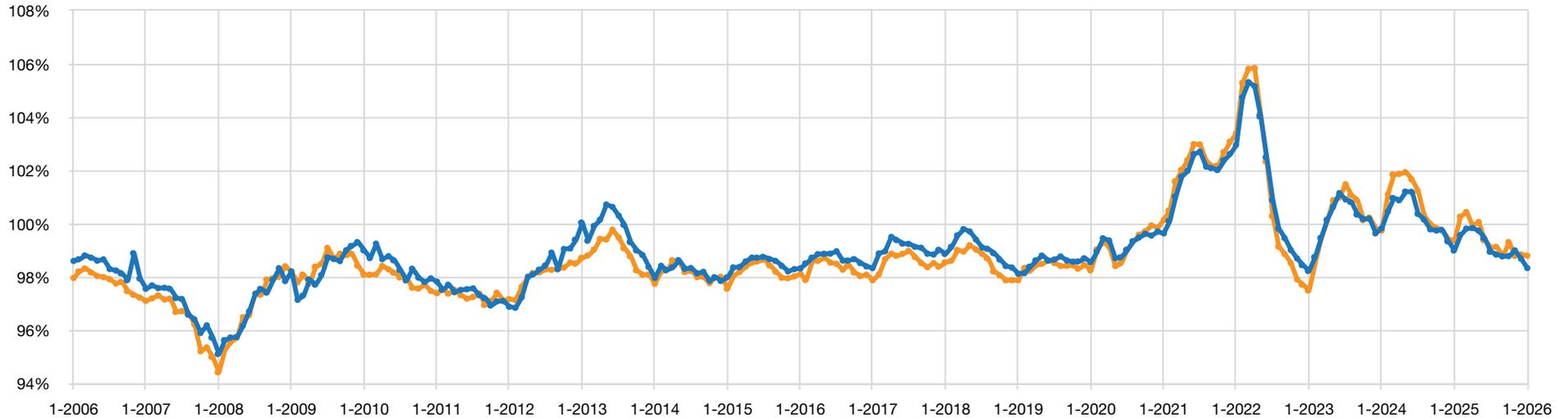
Year to Date



Pct. of List Price Received	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
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%
Nov-2025	98.8%	-1.0%	99.0%	-0.8%
Dec-2025	98.8%	-0.6%	98.7%	-0.6%
Jan-2026	98.8%	-0.6%	98.3%	-0.7%
12-Month Avg*	99.4%	-1.4%	99.2%	-1.1%

* Pct. of List Price Received for all properties from February 2025 through January 2026. This is not the average of the individual figures above.

Historical Percent of List Price Received by Month



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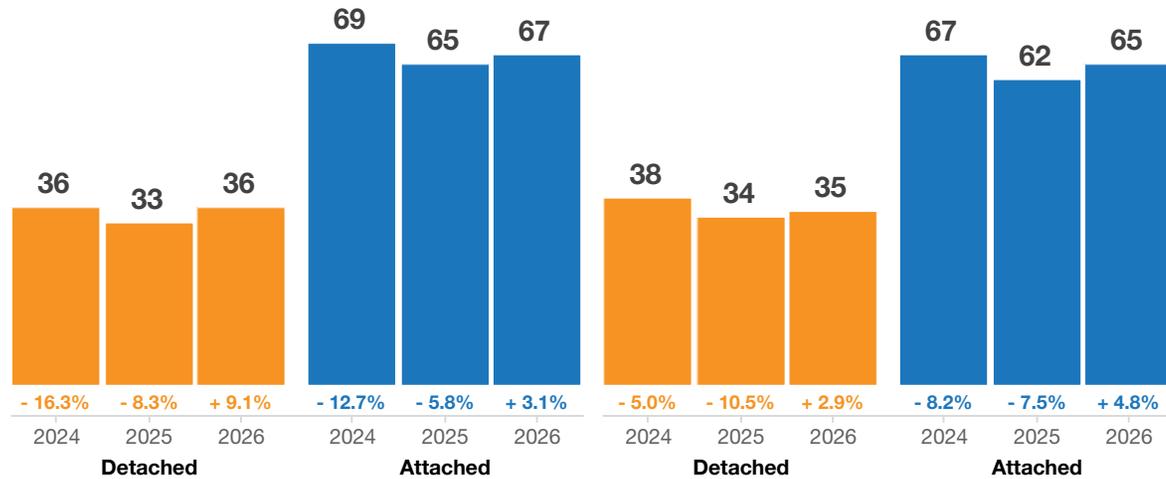
Housing Affordability Index

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.



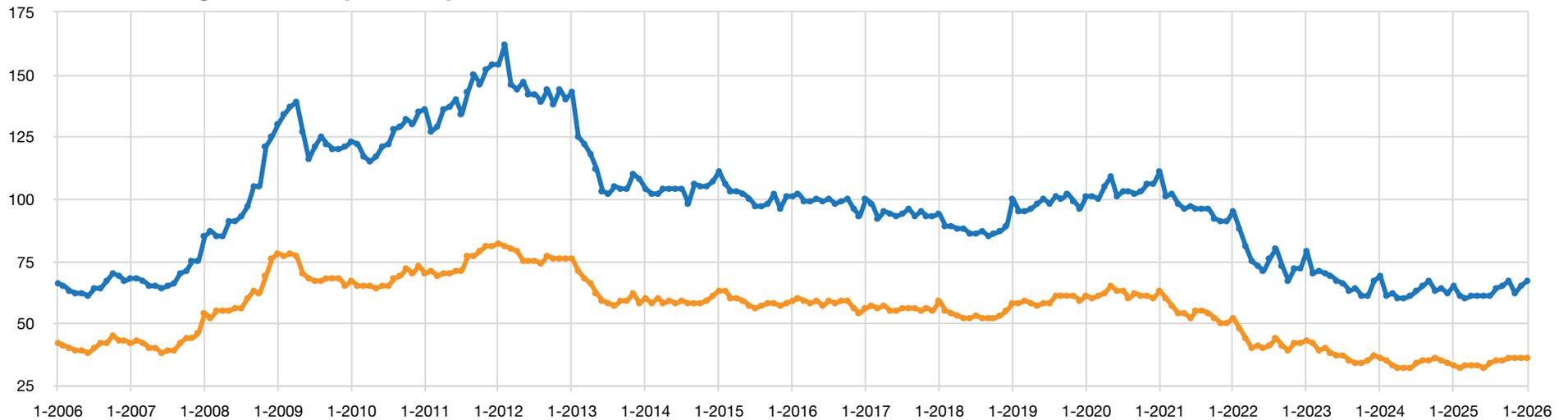
January

Year to Date



Affordability Index	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Feb-2025	32	- 8.6%	61	0.0%
Mar-2025	33	0.0%	60	- 3.2%
Apr-2025	33	+ 3.1%	61	+ 1.7%
May-2025	33	+ 3.1%	61	+ 1.7%
Jun-2025	32	0.0%	61	0.0%
Jul-2025	34	0.0%	61	- 3.2%
Aug-2025	35	0.0%	64	- 1.5%
Sep-2025	35	0.0%	65	- 3.0%
Oct-2025	36	0.0%	67	+ 6.3%
Nov-2025	36	+ 2.9%	62	- 3.1%
Dec-2025	36	+ 5.9%	65	+ 4.8%
Jan-2026	36	+ 9.1%	67	+ 3.1%
12-Month Avg	34	0.0%	63	0.0%

Historical Housing Affordability Index by Month



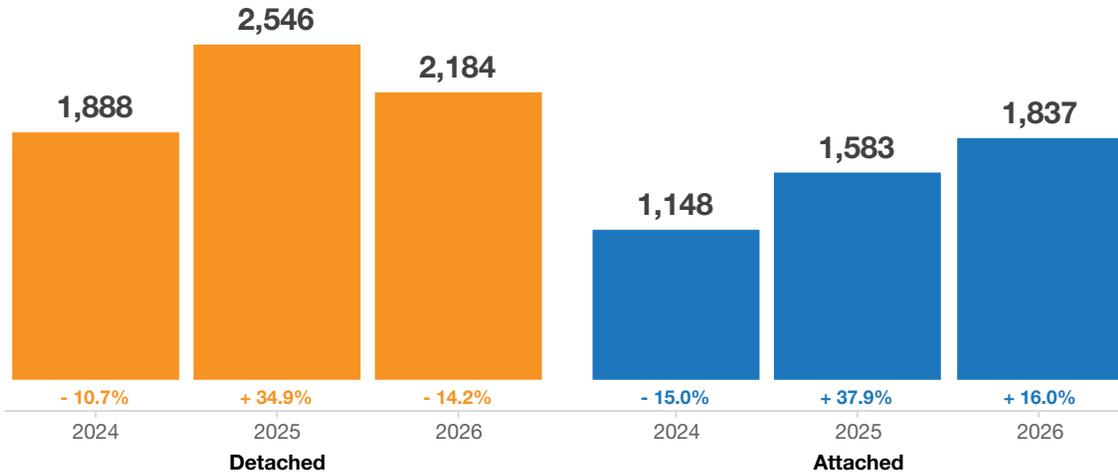
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Inventory of Homes for Sale

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

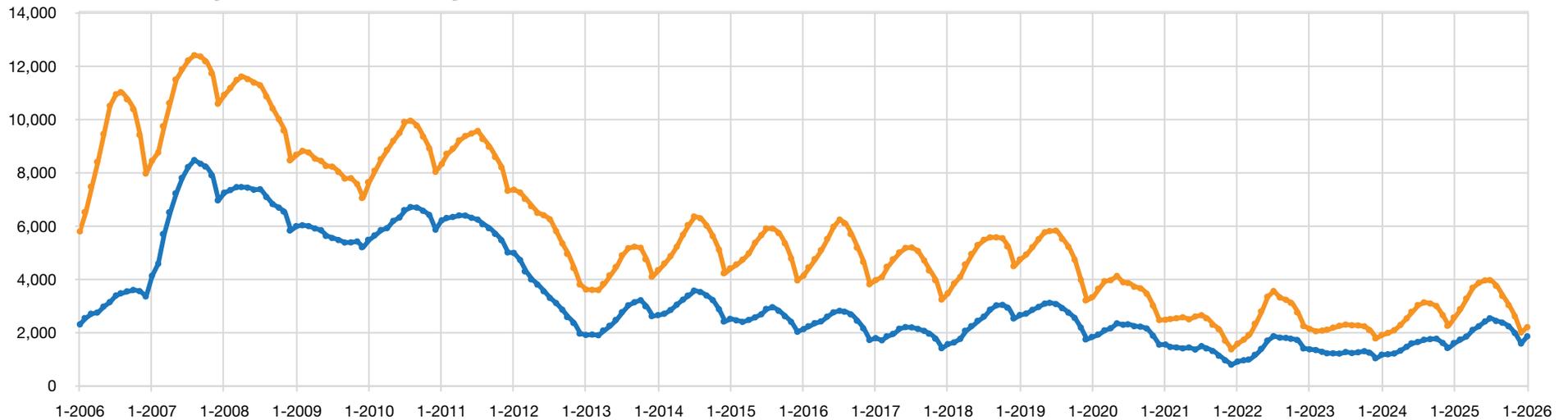


January



Homes for Sale	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Feb-2025	2,858	+ 45.4%	1,714	+ 47.4%
Mar-2025	3,255	+ 57.6%	1,829	+ 53.4%
Apr-2025	3,659	+ 61.6%	2,077	+ 59.8%
May-2025	3,845	+ 53.2%	2,214	+ 53.2%
Jun-2025	3,937	+ 42.7%	2,395	+ 52.3%
Jul-2025	3,946	+ 31.1%	2,514	+ 54.7%
Aug-2025	3,733	+ 20.0%	2,413	+ 41.3%
Sep-2025	3,354	+ 9.3%	2,349	+ 35.5%
Oct-2025	3,012	+ 1.3%	2,213	+ 26.6%
Nov-2025	2,587	- 1.7%	1,960	+ 23.4%
Dec-2025	1,982	- 11.2%	1,566	+ 11.9%
Jan-2026	2,184	- 14.2%	1,837	+ 16.0%
12-Month Avg	3,196	+ 23.2%	2,090	+ 38.9%

Historical Inventory of Homes for Sale by Month



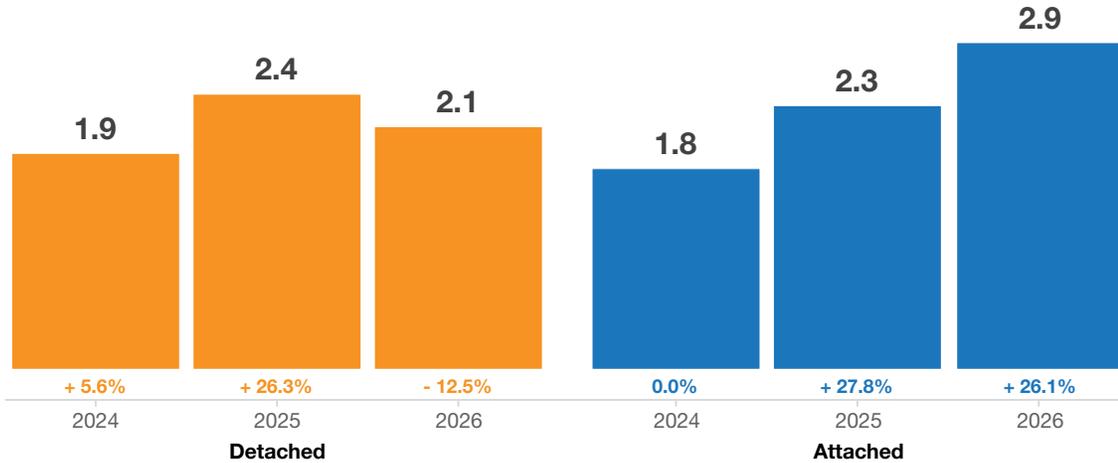
The accuracy of all information is deemed reliable but not guaranteed and should be personally verified through personal inspection by and/or with the appropriate professionals.

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.



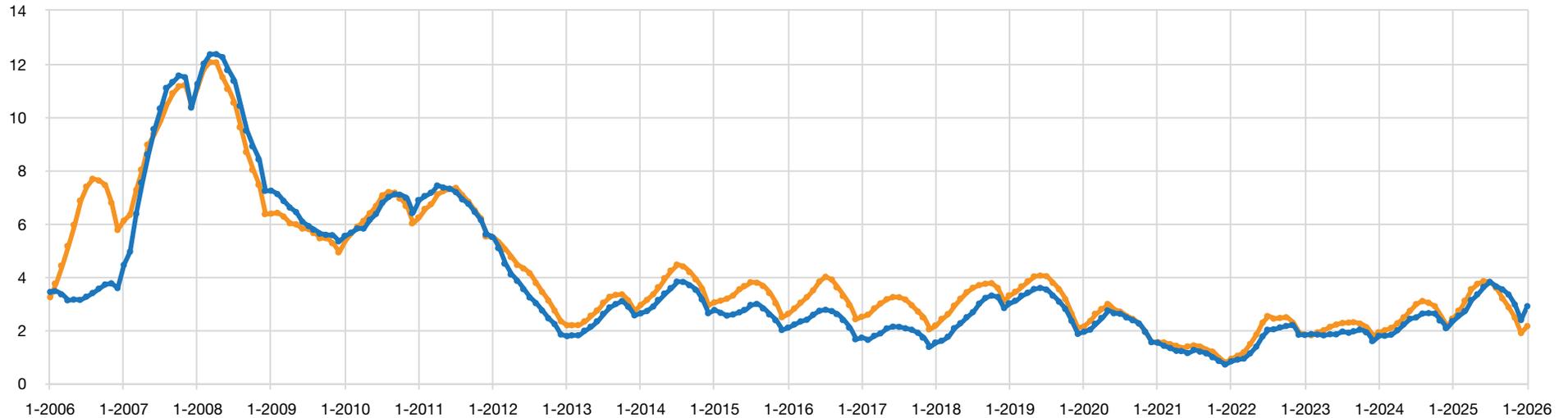
January



Months Supply	Detached	Year-Over-Year Change	Attached	Year-Over-Year Change
Feb-2025	2.7	+ 35.0%	2.5	+ 38.9%
Mar-2025	3.1	+ 47.6%	2.7	+ 50.0%
Apr-2025	3.5	+ 52.2%	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	3.8	+ 26.7%	3.8	+ 52.0%
Aug-2025	3.6	+ 16.1%	3.6	+ 38.5%
Sep-2025	3.2	+ 6.7%	3.5	+ 34.6%
Oct-2025	2.9	0.0%	3.3	+ 26.9%
Nov-2025	2.5	0.0%	3.0	+ 25.0%
Dec-2025	1.9	- 9.5%	2.4	+ 14.3%
Jan-2026	2.1	- 12.5%	2.9	+ 26.1%
12-Month Avg*	3.1	+ 20.5%	3.2	+ 38.5%

* Months Supply for all properties from February 2025 through January 2026. 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 a rolling 12-month view of activity.



Key Metrics	Historical Sparkbars	1-2025	1-2026	% Change	YTD 2025	YTD 2026	% Change
New Listings		2,549	2,060	- 19.2%	27,449	28,493	+ 3.8%
Pending Sales		1,544	833	- 46.0%	21,018	19,941	- 5.1%
Closed Sales		1,268	1,213	- 4.3%	20,978	20,680	- 1.4%
Days on Market Until Sale		40	50	+ 25.0%	27	35	+ 29.6%
Median Sales Price		\$1,165,000	\$1,175,000	+ 0.9%	\$1,160,000	\$1,185,000	+ 2.2%
Average Sales Price		\$1,533,708	\$1,652,245	+ 7.7%	\$1,482,456	\$1,540,712	+ 3.9%
Pct. of Orig. Price Received		97.8%	96.7%	- 1.1%	99.7%	97.8%	- 1.9%
Percent of List Price Received		99.2%	98.6%	- 0.6%	100.6%	99.3%	- 1.3%
Housing Affordability Index		40	43	+ 7.5%	41	43	+ 4.9%
Inventory of Homes for Sale		4,206	4,023	- 4.4%	—	—	—
Months Supply of Inventory		2.4	2.4	0.0%	—	—	—

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