Market Synopsis

Published: September 2026*

Sac-Pla-Eld Counties combined

Income-Duplex



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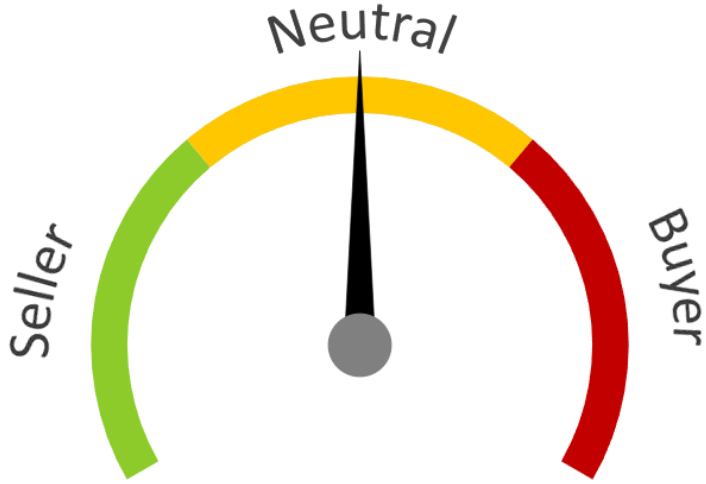
September 2026 was a Neutral market! The number of for sale listings was up ***1.9%*** from one year earlier and up ***1.9%*** from the previous month. The number of sold listings decreased ***54.5%*** year over year and decreased ***25.9%*** month over month. The number of under contract listings was up ***31.8%*** compared to previous month and down ***21.6%*** compared to previous year. The Months of Inventory based on Closed Sales was 5.3, up ***122.7%*** from the previous year.

The Average Sold Price per Square Footage was 0. The Median Sold Price increased by ***2.1%*** from last month. The Average Sold Price also increased by ***2.3%*** from last month. Based on the 6 month trend, the Average Sold Price trend was "Neutral" and the Median Sold Price trend was "Neutral".

The Average Days on Market showed a neutral trend, a decrease of ***9.3%*** compared to previous year. The ratio of Sold Price vs. Original List Price was 98%, an increase of ***2.1%*** compared to previous year.



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For Sale (Current Inventory)

The number of properties that were in the active status on the last day of the calendar month.

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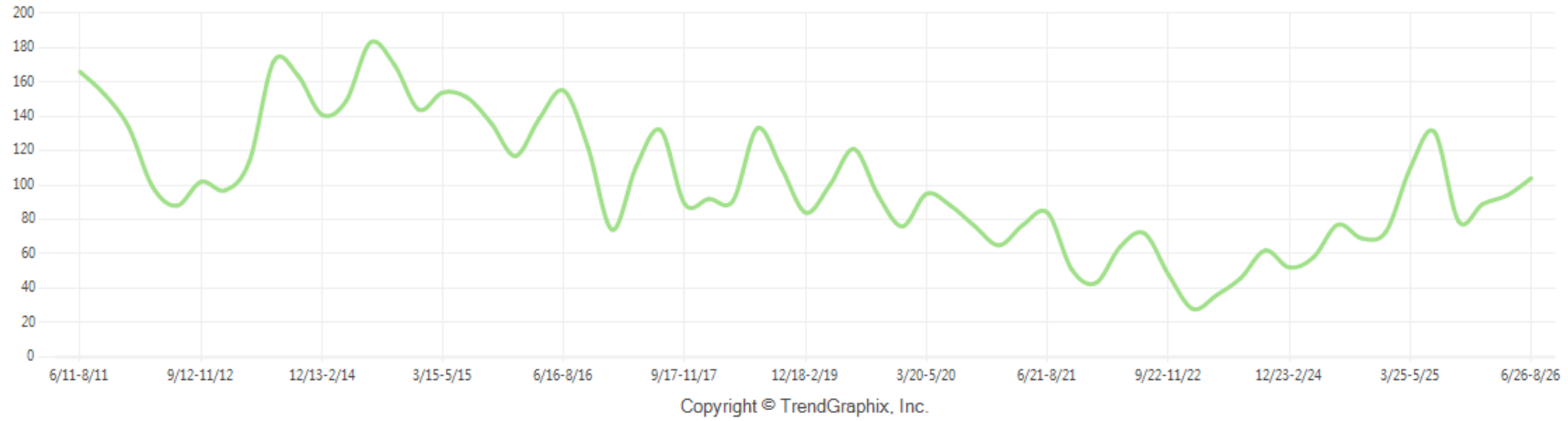
It was a Neutral Market

Versus last year, the total number of properties available this month was higher by 2 units of ***1.9%***. This year's bigger inventory means that buyers who waited to buy may have bigger selection to choose from. The number of current inventory was up ***1.9%*** compared to the previous month.

For Sale (Current Inventory)		Prior Year	% Change
September 2025	104	79	31.6% ▲
October 2025	82	75	9.3% ▲
November 2025	79	69	14.5% ▲
December 2025	60	61	-1.6% ▼
January 2026	77	72	6.9% ▲
February 2026	89	73	21.9% ▲
March 2026	74	73	1.4% ▲
April 2026	76	94	-19.1% ▼
May 2026	94	110	-14.5% ▼
June 2026	107	130	-17.7% ▼
July 2026	104	121	-14% ▼
August 2026	**104**	**131**	**-20.6%** ▼
12-Month Average	87.5	90.67	-3.5% ▼



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Pended (Property Under Contract)

The number of properties that went into contract during the course of a calendar month / had a "pending" date of between the 1st and the last day of the calendar month.

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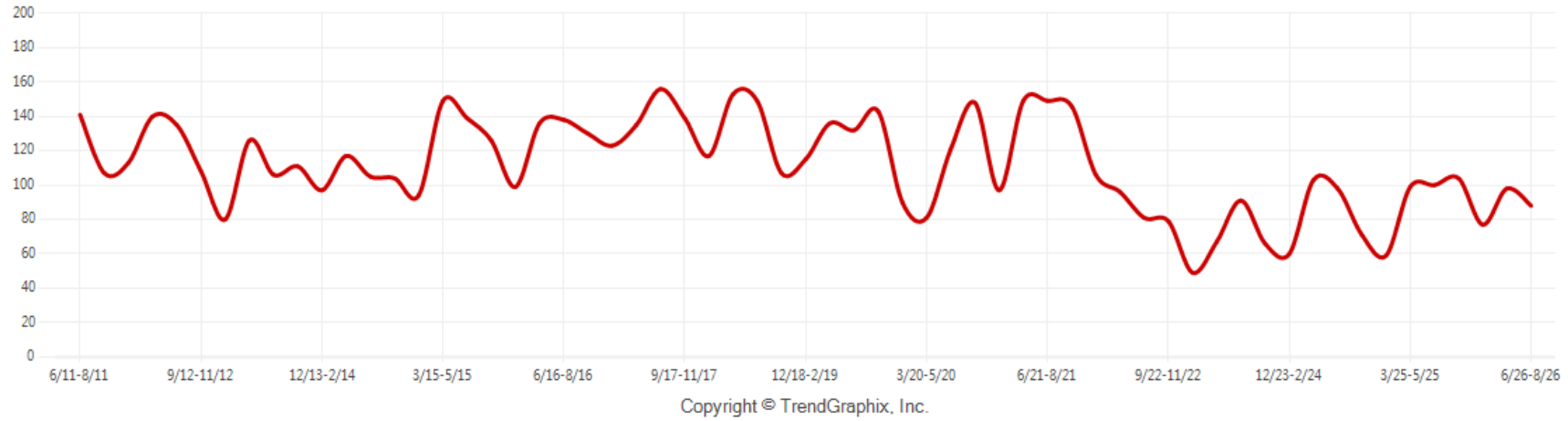
It was a Neutral Market

There was an increase of ***31.8%*** in the pended properties in September, with 29 properties versus 22 last month. This month's pended property sales were ***21.6%*** lower than at this time last year.

Pended (Property Under Contract)		Prior Year	% Change
September 2025	37	29	27.6% ▲
October 2025	32	23	39.1% ▲
November 2025	35	19	84.2% ▲
December 2025	15	20	-25% ▼
January 2026	27	17	58.8% ▲
February 2026	35	22	59.1% ▲
March 2026	35	35	0%
April 2026	39	30	30% ▲
May 2026	24	34	-29.4% ▼
June 2026	27	27	0%
July 2026	36	40	-10% ▼
August 2026	**25**	**33**	**-24.2%** ▼
12-Month Average	30.58	27.42	11.5% ▲



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Sold (Property Sales)

The number of properties that closed sale during the course of a calendar month.

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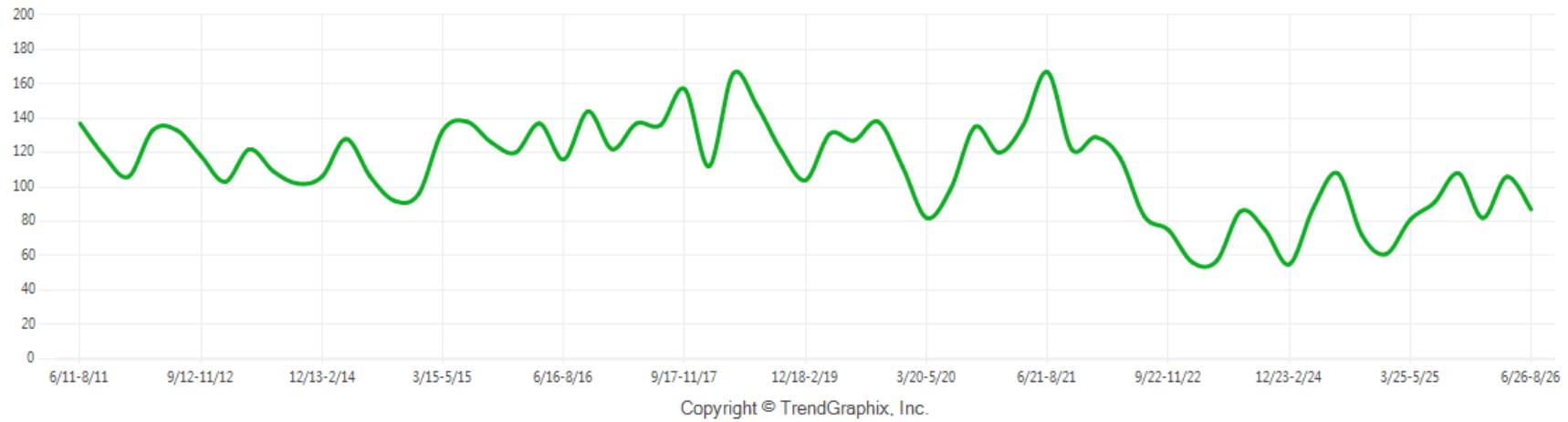
It was a Neutral Market

September property sales were 20, down ***54.5%*** from 44 in September of 2025 and ***25.9%*** lower than the 27 sales last month.

Sold (Property Sales)		Prior Year	% Change
September 2025	44	27	63% ▲
October 2025	34	25	36% ▲
November 2025	30	20	50% ▲
December 2025	34	23	47.8% ▲
January 2026	22	18	22.2% ▲
February 2026	26	20	30% ▲
March 2026	28	21	33.3% ▲
April 2026	43	37	16.2% ▲
May 2026	35	23	52.2% ▲
June 2026	27	32	-15.6% ▼
July 2026	34	24	41.7% ▲
August 2026	**26**	**35**	**-25.7%** ▼
12-Month Average	31.92	25.42	25.6% ▲



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New Listings

The number of properties that had a listed date between the 1st and the last day of the calendar month.

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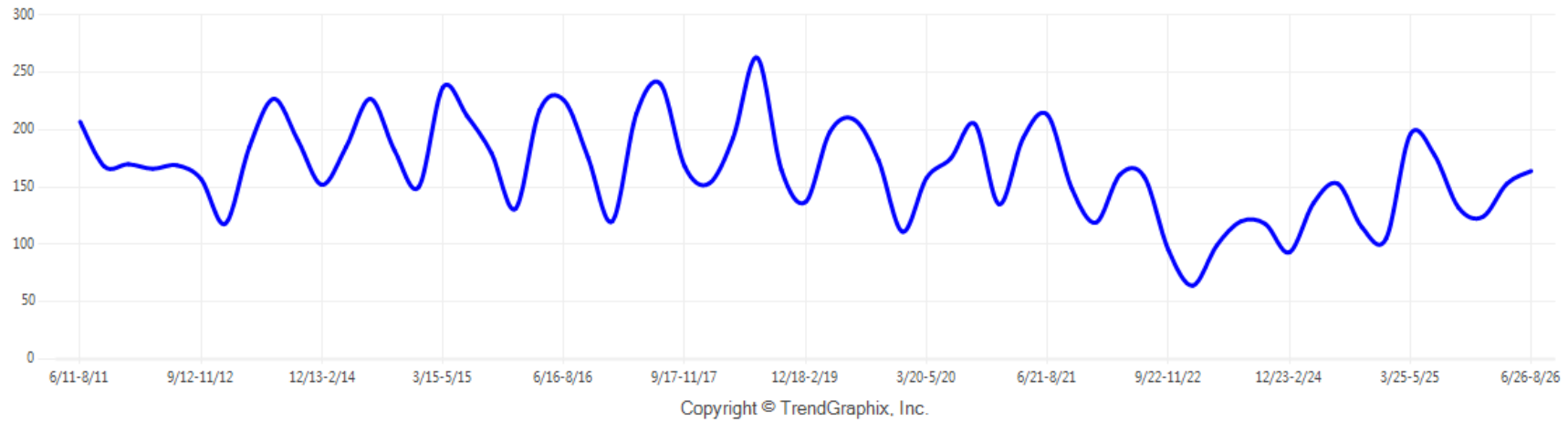
It was a Neutral Market

There was an increase of ***14.9%*** in the newly listed properties in September, with 54 properties versus 47 last month. This month's new listing properties were ***12.5%*** higher than at this time last year. This year's increase provides more supply of property selections for buyers.

New Listings		Prior Year	% Change
September 2025	48	39	23.1% ▲
October 2025	40	46	-13% ▼
November 2025	44	30	46.7% ▲
December 2025	23	33	-30.3% ▼
January 2026	49	40	22.5% ▲
February 2026	52	32	62.5% ▲
March 2026	45	60	-25% ▼
April 2026	60	66	-9.1% ▼
May 2026	48	70	-31.4% ▼
June 2026	59	62	-4.8% ▼
July 2026	57	50	14% ▲
August 2026	**48**	**66**	**-27.3% ▼**
12-Month Average	47.75	49.5	-3.5% ▼



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Average Sold Price per Square Footage

The average price per square foot of properties that closed sale during the course of a calendar month.

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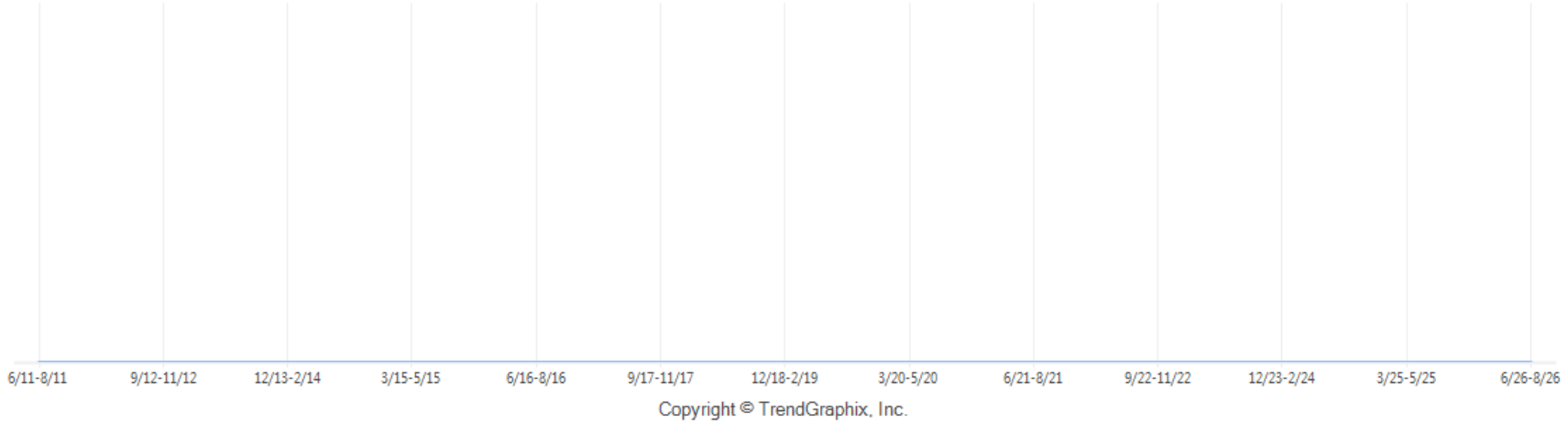
*The Average Sold Price per Square Footage was Neutral**

The Average Sold Price per Square Footage is a great indicator for the direction of property values. Since Median Sold Price and Average Sold Price can be impacted by the 'mix' of high or low end properties in the market, the Average Sold Price per Square Footage is a more normalized indicator on the direction of property values. The September 2026 Average Sold Price per Square Footage of $0.

* Based on 6 month trend – Appreciating/Depreciating/Neutral

Average Sold Price per Square Footage		Prior Year	% Change
September 2025	0	0	N/A
October 2025	0	0	N/A
November 2025	0	0	N/A
December 2025	0	0	N/A
January 2026	0	0	N/A
February 2026	0	0	N/A
March 2026	0	0	N/A
April 2026	0	0	N/A
May 2026	0	0	N/A
June 2026	0	0	N/A
July 2026	0	0	N/A
August 2026	**0**	**0**	**N/A**
12-Month Average	0	0	N/A



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Days on Market

The average number of days that a property that went off market during the calendar month, spent on the market.

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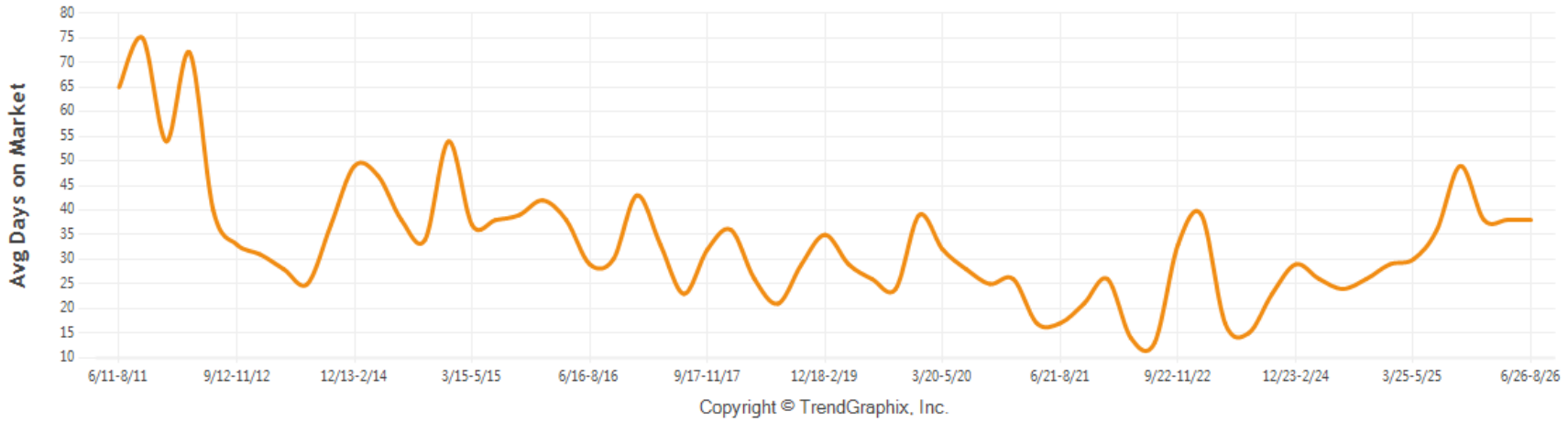
*The Days on Market Showed Neutral Trend**

The average Days on Market (DOM) shows how many days the average property is on the market before it sells. An upward trend in DOM trends to indicate a move towards more of a Buyer's market, a downward trend indicates a move towards more of a Seller's market. The DOM for September 2026 was 39, down ***9.3%*** from 43 days last month and down ***9.3%*** from 43 days in September of last year.

Days on Market		Prior Year	% Change
September 2025	43	25	72% ▲
October 2025	56	31	80.6% ▲
November 2025	50	21	138.1% ▲
December 2025	42	25	68% ▲
January 2026	33	25	32% ▲
February 2026	36	37	-2.7% ▼
March 2026	26	39	-33.3% ▼
April 2026	34	24	41.7% ▲
May 2026	51	32	59.4% ▲
June 2026	39	36	8.3% ▲
July 2026	33	32	3.1% ▲
August 2026	**42**	**38**	**10.5%** ▲
12-Month Average	40.42	30.42	32.9% ▲



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Sold/Original List Price Ratio

The difference between the price a property was last listed at(before going into contract) and the price it sold at.

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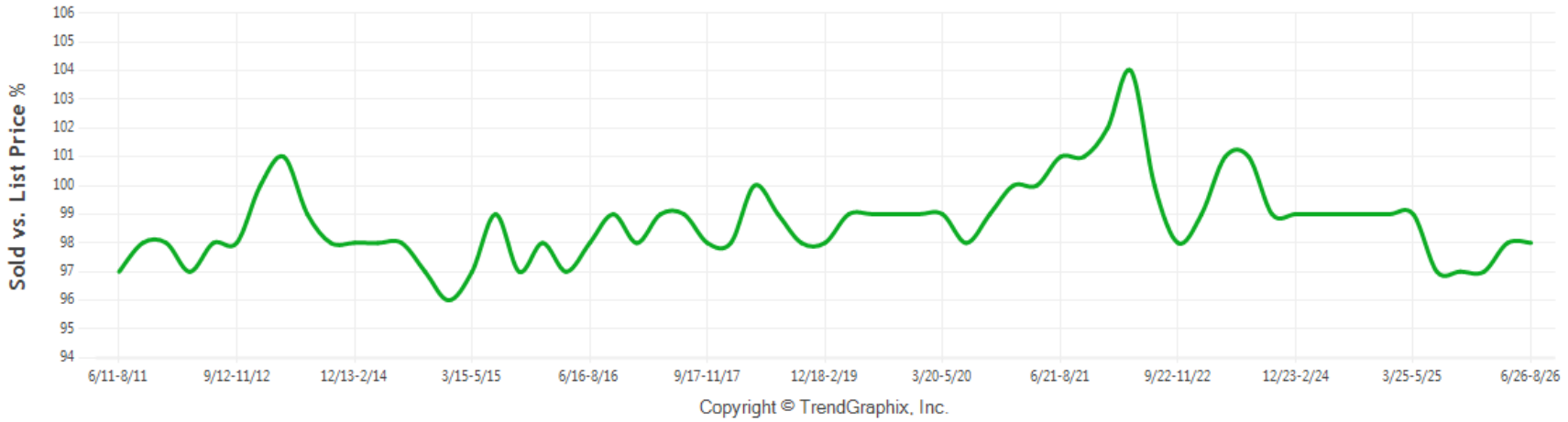
*The Sold/List Price Ratio Remains Steady***

The Sold Price vs. List Price reveals the average amount that sellers are agreeing to come down from their list price. The lower the ratio is below 100% the more of a Buyer's market exists, a ratio at or above 100% indicates more of a Seller's market. This month Sold Price vs. List Price of 98% was the same as last month and the same as in September of last year.

* Based on 6 month trend – Upward/Downward/Neutral
** Based on 6 month trend – Rising/Falling/Remains Steady

Sold/Original List Price Ratio		Prior Year	% Change
September 2025	98	99	-1% ▼
October 2025	97	99	-2% ▼
November 2025	97	99	-2% ▼
December 2025	98	98	0%
January 2026	99	100	-1% ▼
February 2026	95	98	-3.1% ▼
March 2026	98	99	-1% ▼
April 2026	98	99	-1% ▼
May 2026	97	100	-3% ▼
June 2026	98	97	1% ▲
July 2026	98	99	-1% ▼
August 2026	**98**	**96**	**2.1% ▲**
12-Month Average	97.58	98.58	-1% ▼



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Average For Sale Price

The average price of homes that were in the active status as of the last day of the calendar month.

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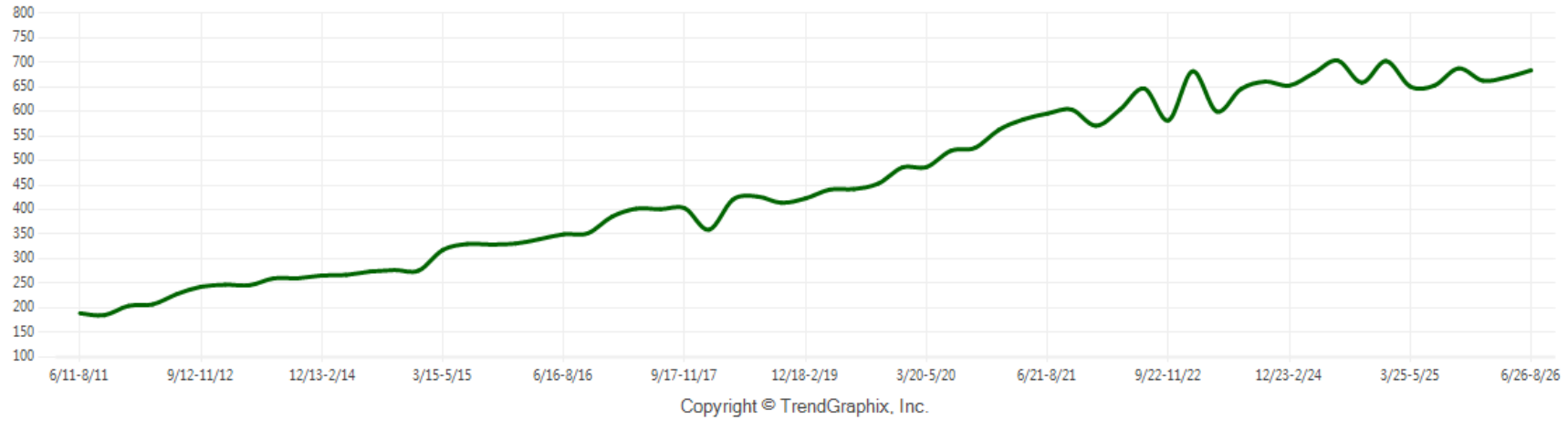
*The Average For Sale Price was Neutral**

The Average For Sale Price in September was $681,000, up ***2.1%*** from $667,000 in September of 2025 and down ***0.4%*** from $684,000 last month.

* Based on 6 month trend – Appreciating/Depreciating/Neutral

Average For Sale Price		Prior Year	% Change
September 2025	667	692	-3.6% ▼
October 2025	669	671	0.3% ▼
November 2025	688	659	4.4% ▲
December 2025	685	642	6.7% ▲
January 2026	701	653	7.4% ▲
February 2026	663	703	-5.7% ▼
March 2026	705	684	3.1% ▲
April 2026	669	673	0.6% ▼
May 2026	670	651	2.9% ▲
June 2026	643	657	-2.1% ▼
July 2026	653	668	-2.2% ▼
August 2026	**684**	**653**	**4.7%** ▲
12-Month Average	674.75	667.17	1.1% ▲



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Average Sold Price

The average price of homes that closed transaction / had a close date during the course of the calendar month.

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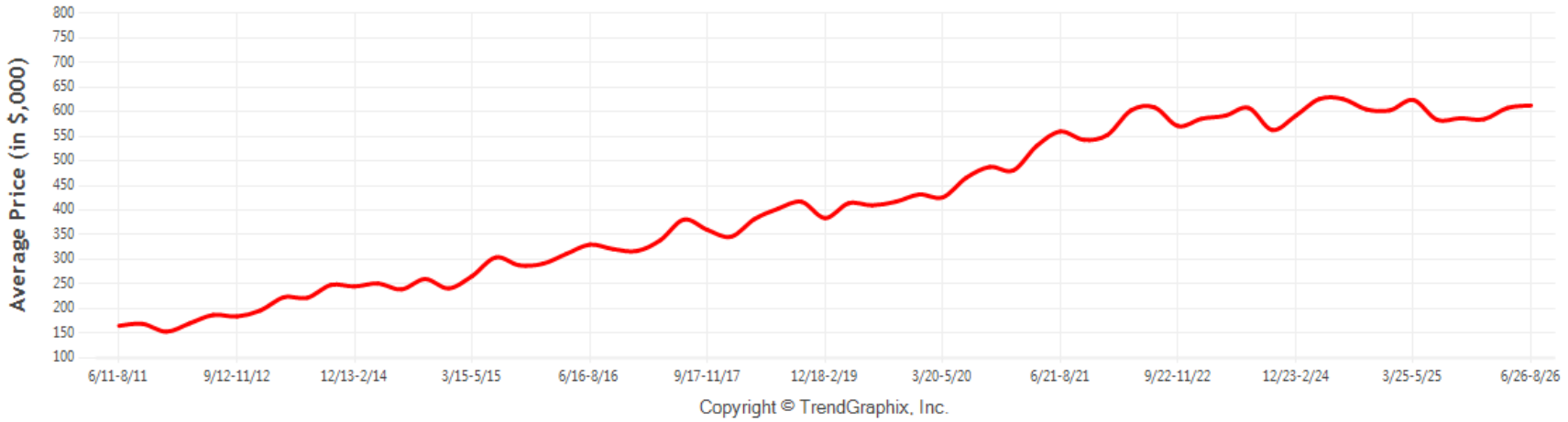
*The Average Sold Price was Neutral**

The Average Sold Price in September was $589,000, up ***2.1%*** from $577,000 in September of 2025 and up ***2.3%*** from $576,000 last month.

* Based on 6 month trend – Appreciating/Depreciating/Neutral

Average Sold Price		Prior Year	% Change
September 2025	577	578	0.2% ▼
October 2025	602	624	-3.5% ▼
November 2025	584	617	-5.3% ▼
December 2025	594	615	-3.4% ▼
January 2026	577	605	-4.6% ▼
February 2026	579	587	-1.4% ▼
March 2026	635	628	1.1% ▲
April 2026	579	629	-7.9% ▼
May 2026	621	614	1.1% ▲
June 2026	633	596	6.2% ▲
July 2026	628	563	11.5% ▲
August 2026	**574**	**588**	**-2.4% ▼**
12-Month Average	598.58	603.67	0.8% ▼



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Median Sold Price

The middle value of all homes sold / closed sale during the course of a calendar month.

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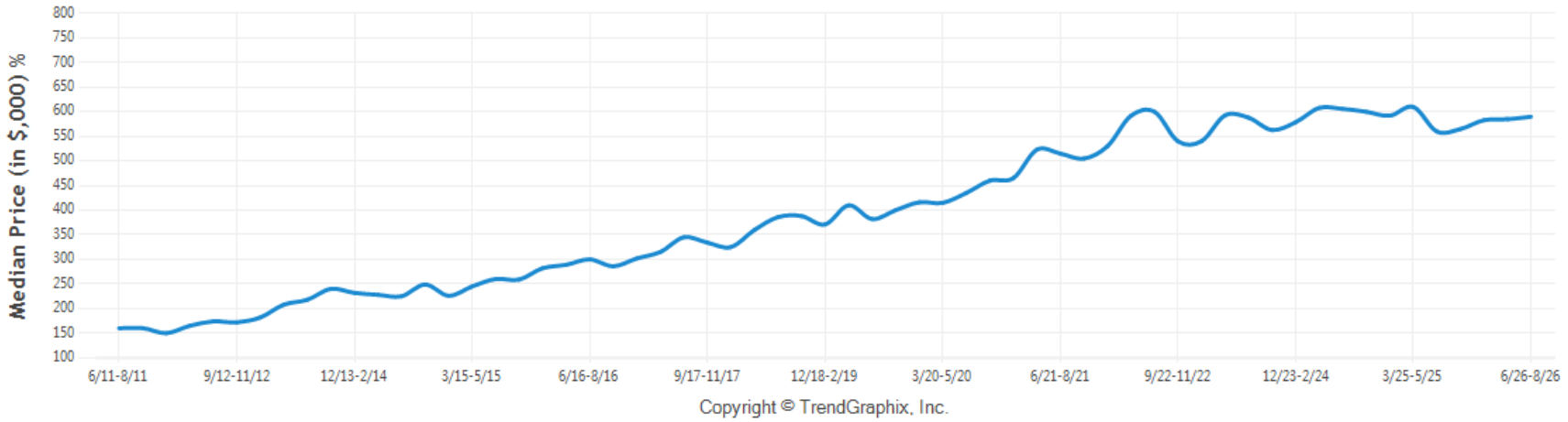
*The Median Sold Price was Neutral**

The Median Sold Price in September was $582,000, up ***3.2%*** from $564,000 in September of 2025 and up ***2.1%*** from $570,000 last month.

* Based on 6 month trend – Appreciating/Depreciating/Neutral

Median Sold Price		Prior Year	% Change
September 2025	564	600	-6% ▼
October 2025	565	607	-6.9% ▼
November 2025	560	589	-4.9% ▼
December 2025	589	599	-1.7% ▼
January 2026	563	618	-8.9% ▼
February 2026	583	579	0.7% ▲
March 2026	636	625	1.8% ▲
April 2026	575	615	-6.5% ▼
May 2026	585	610	-4.1% ▼
June 2026	589	563	4.6% ▲
July 2026	604	544	11% ▲
August 2026	**568**	**580**	**-2.1% ▼**
12-Month Average	581.75	594.08	-2.1% ▼



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Months of Inventory based on Closed Sales

Calculated by dividing the number of homes that closed sale in a given calendar month, into the number of homes that were active at the end of a given calendar month.

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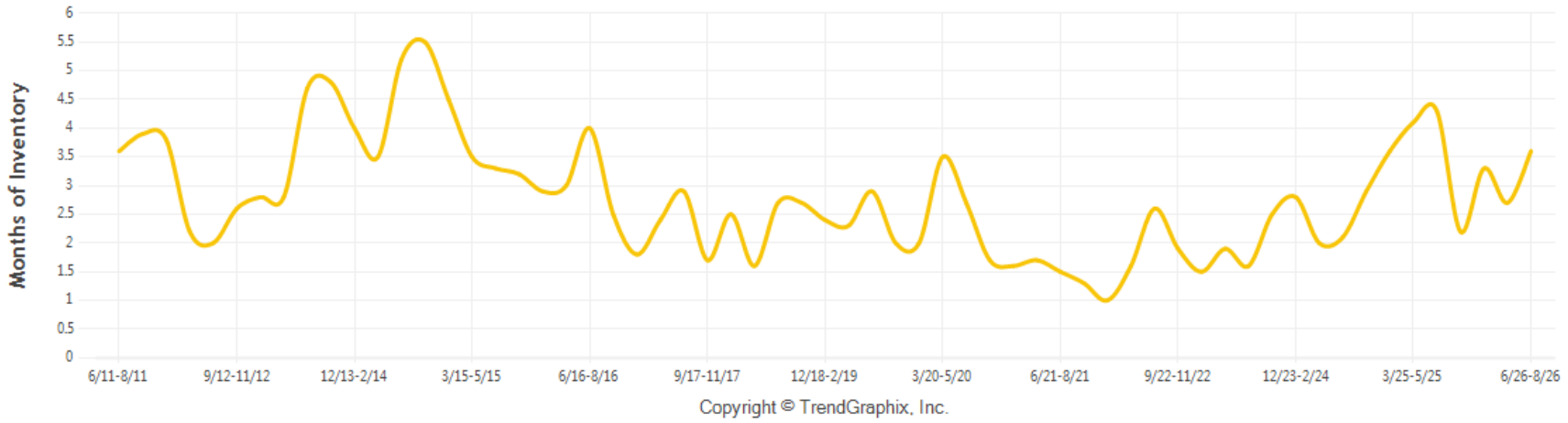
*It was a Neutral Market**

A comparatively lower Months of Inventory is more beneficial for sellers while a higher months of inventory is better for buyers.

*Buyer's market: more than 6 months of inventory
Seller's market: less than 3 months of inventory
Neutral market: 3 – 6 months of inventory

Months of Inventory based on Closed Sales
The September 2026 Months of Inventory based on Closed Sales of 5.3 was increased by ***122.7%*** compared to last year and up ***36.3%*** compared to last month. September 2026 was Neutral market.

Months of Inventory based on Closed Sales		Prior Year	% Change
September 2025	2.4	2.9	-17.1% ▼
October 2025	2.4	3	-20% ▼
November 2025	2.6	3.5	-26.1% ▼
December 2025	1.8	2.7	-33.9% ▼
January 2026	3.5	4	-12.5% ▼
February 2026	3.4	3.7	-8.2% ▼
March 2026	2.6	3.5	-25.9% ▼
April 2026	1.8	2.5	-27.6% ▼
May 2026	2.7	4.8	-43.9% ▼
June 2026	4	4.1	-2.5% ▼
July 2026	3.1	5	-37.7% ▼
August 2026	**4**	**3.7**	**8% ▲**
12-Month Average	2.9	3.6	-19.4% ▼



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Months of Inventory based on Pended Sales

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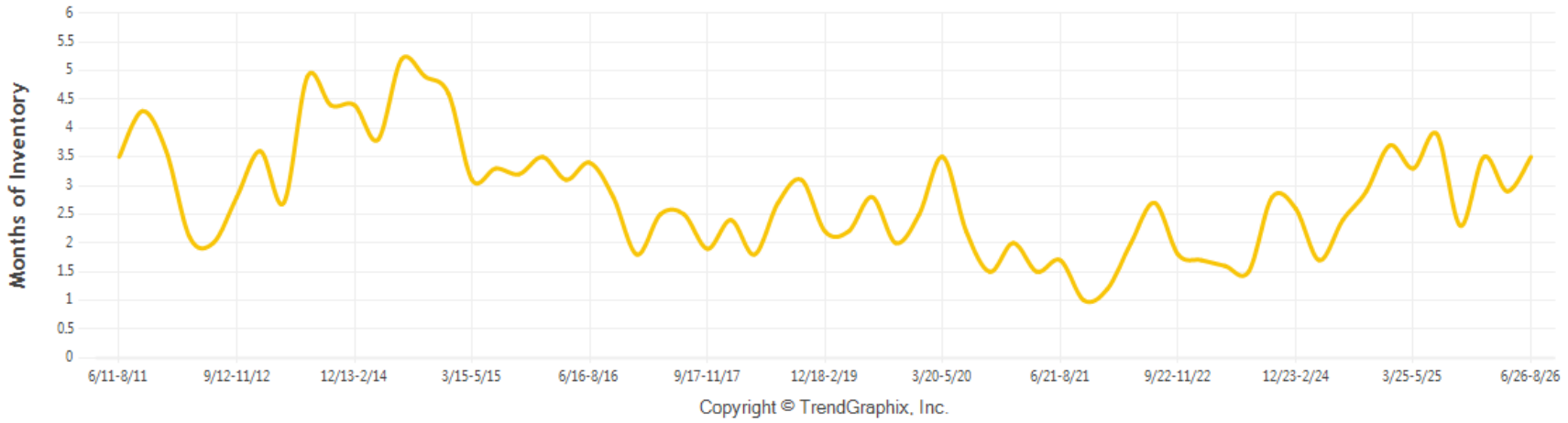
A comparatively lower Months of Inventory is more beneficial for sellers while a higher months of inventory is better for buyers.

*Buyer's market: more than 6 months of inventory
Seller's market: less than 3 months of inventory
Neutral market: 3 – 6 months of inventory

Months of Inventory based on Pended Sales
The September 2026 Months of Inventory based on Pended Sales of 3.7 was increased by ***32%*** compared to last year and down ***21.2%*** compared to last month. September 2026 was Neutral market.

Months of Inventory based on Pended Sales		Prior Year	% Change
September 2025	2.8	2.7	3.7% ▲
October 2025	2.6	3.3	-21.5% ▼
November 2025	2.3	3.6	-35.8% ▼
December 2025	4	3.1	29.5% ▲
January 2026	2.9	4.2	-30.7% ▼
February 2026	2.5	3.3	-24.1% ▼
March 2026	2.1	2.1	0%
April 2026	1.9	3.1	-38.3% ▼
May 2026	3.9	3.2	21.6% ▲
June 2026	4	4.8	-16.6% ▼
July 2026	2.9	3	-3.3% ▼
August 2026	**4.2**	**4**	**5%** ▲
12-Month Average	3	3.4	-11.9% ▼



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