

# 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 increased 7.4 percent for Residential homes and 8.5 percent for Townhouse/Condo homes. Pending Sales decreased 0.9 percent for Residential homes but increased 18.3 percent for Townhouse/Condo homes. Inventory decreased 7.4 percent for Residential homes but increased 9.4 percent for Townhouse/Condo homes.

Median Sales Price increased 6.7 percent to \$320,000 for Residential homes but decreased 15.9 percent to \$206,000 for Townhouse/Condo homes. Days on Market decreased 3.3 percent for Residential homes but increased 36.4 percent for Townhouse/Condo homes. Months Supply of Inventory decreased 7.4 percent for Residential homes but increased 6.1 percent for Townhouse/Condo homes.

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.

## Quick Facts

**+ 3.2%**

Change in  
**Closed Sales**  
All Properties

**+ 5.5%**

Change in  
**Median Sales Price**  
All Properties

**- 4.4%**

Change in  
**Homes for Sale**  
All Properties

This report provided by MARIS covers residential real estate activity in the St. Louis REALTORS® service area. Percent changes are calculated using rounded figures.

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# Residential Market Overview

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



Key Metrics	Historical Sparkbars	10-2024	10-2025	% Change	YTD 2024	YTD 2025	% Change
<b>New Listings</b>		1,841	<b>1,977</b>	+ 7.4%	17,517	<b>18,189</b>	+ 3.8%
<b>Pending Sales</b>		1,377	<b>1,364</b>	- 0.9%	14,179	<b>14,147</b>	- 0.2%
<b>Closed Sales</b>		1,431	<b>1,483</b>	+ 3.6%	13,763	<b>13,636</b>	- 0.9%
<b>Days on Market Until Sale</b>		30	<b>29</b>	- 3.3%	29	<b>30</b>	+ 3.4%
<b>Median Sales Price</b>		\$300,000	<b>\$320,000</b>	+ 6.7%	\$290,000	<b>\$310,000</b>	+ 6.9%
<b>Average Sales Price</b>		\$383,122	<b>\$419,229</b>	+ 9.4%	\$363,308	<b>\$388,286</b>	+ 6.9%
<b>Percent of List Price Received</b>		100.1%	<b>100.1%</b>	0.0%	100.9%	<b>100.4%</b>	- 0.5%
<b>Housing Affordability Index</b>		110	<b>106</b>	- 3.6%	114	<b>110</b>	- 3.5%
<b>Inventory of Homes for Sale</b>		3,720	<b>3,444</b>	- 7.4%	—	—	—
<b>Months Supply of Inventory</b>		2.7	<b>2.5</b>	- 7.4%	—	—	—

# Townhouse/Condo Market Overview

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



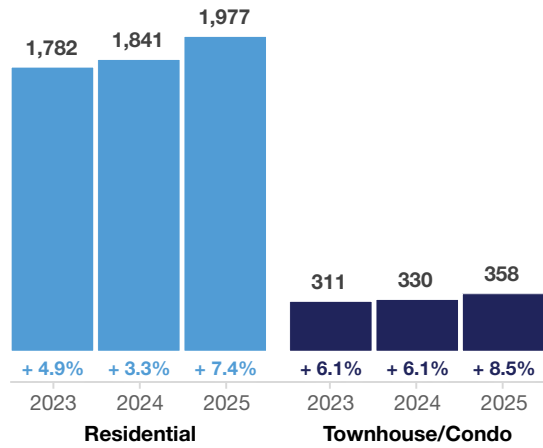
Key Metrics	Historical Sparkbars	10-2024	10-2025	% Change	YTD 2024	YTD 2025	% Change
<b>New Listings</b>		330	<b>358</b>	+ 8.5%	3,208	<b>3,472</b>	+ 8.2%
<b>Pending Sales</b>		197	<b>233</b>	+ 18.3%	2,351	<b>2,398</b>	+ 2.0%
<b>Closed Sales</b>		238	<b>230</b>	- 3.4%	2,305	<b>2,281</b>	- 1.0%
<b>Days on Market Until Sale</b>		33	<b>45</b>	+ 36.4%	31	<b>42</b>	+ 35.5%
<b>Median Sales Price</b>		\$245,000	<b>\$206,000</b>	- 15.9%	\$230,000	<b>\$226,000</b>	- 1.7%
<b>Average Sales Price</b>		\$298,761	<b>\$279,330</b>	- 6.5%	\$279,892	<b>\$282,879</b>	+ 1.1%
<b>Percent of List Price Received</b>		99.2%	<b>97.3%</b>	- 1.9%	99.5%	<b>98.1%</b>	- 1.4%
<b>Housing Affordability Index</b>		133	<b>163</b>	+ 22.6%	141	<b>149</b>	+ 5.7%
<b>Inventory of Homes for Sale</b>		732	<b>801</b>	+ 9.4%	—	—	—
<b>Months Supply of Inventory</b>		3.3	<b>3.5</b>	+ 6.1%	—	—	—

# New Listings

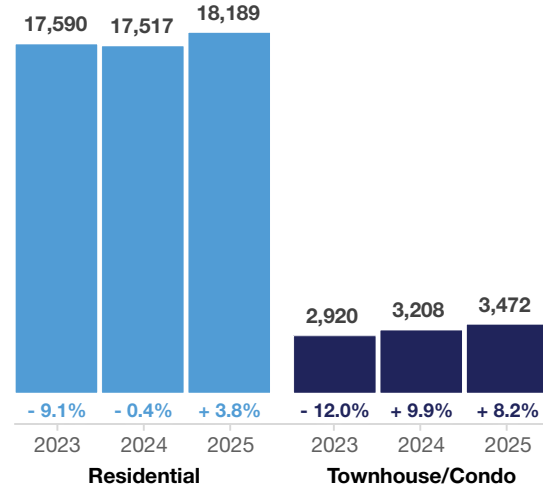
A count of the properties that have been newly listed on the market in a given month.



## October

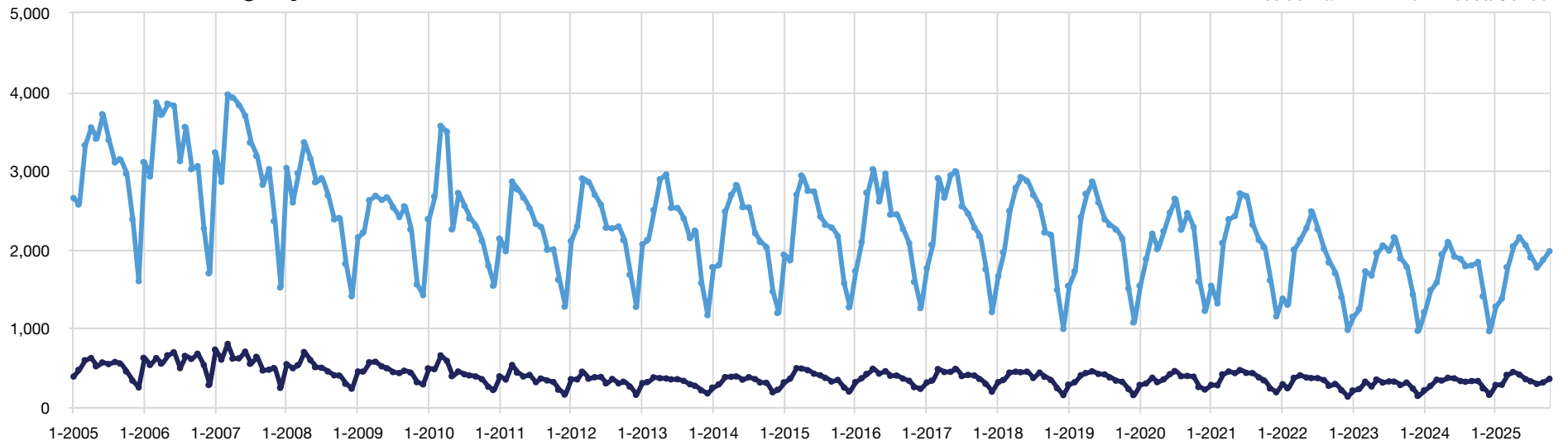


## Year to Date



New Listings	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Nov-2024	1,406	-1.6%	238	+1.7%
Dec-2024	963	-0.4%	155	+9.2%
Jan-2025	1,275	+5.8%	280	+32.7%
Feb-2025	1,375	-7.2%	283	+5.6%
Mar-2025	1,775	+12.3%	408	+17.6%
Apr-2025	2,040	+5.3%	445	+32.4%
May-2025	2,155	+2.9%	411	+10.8%
Jun-2025	2,053	+7.4%	354	-2.7%
Jul-2025	1,899	+1.1%	327	-0.9%
Aug-2025	1,770	-1.0%	293	-8.7%
Sep-2025	1,870	+4.0%	313	-5.2%
<b>Oct-2025</b>	<b>1,977</b>	<b>+7.4%</b>	<b>358</b>	<b>+8.5%</b>
12-Month Avg	1,713	+3.3%	322	+7.7%

## Historical New Listings by Month

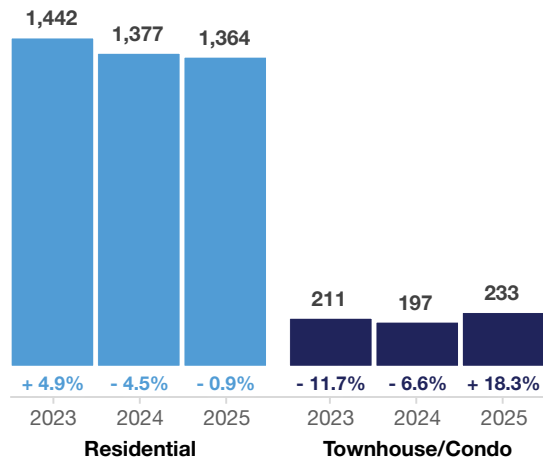


# Pending Sales

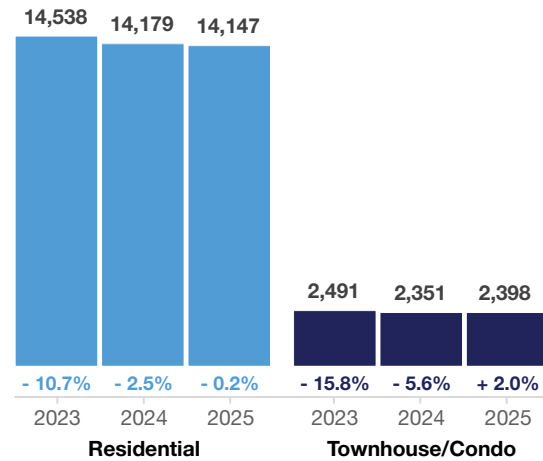
A count of the properties on which offers have been accepted in a given month.



## October

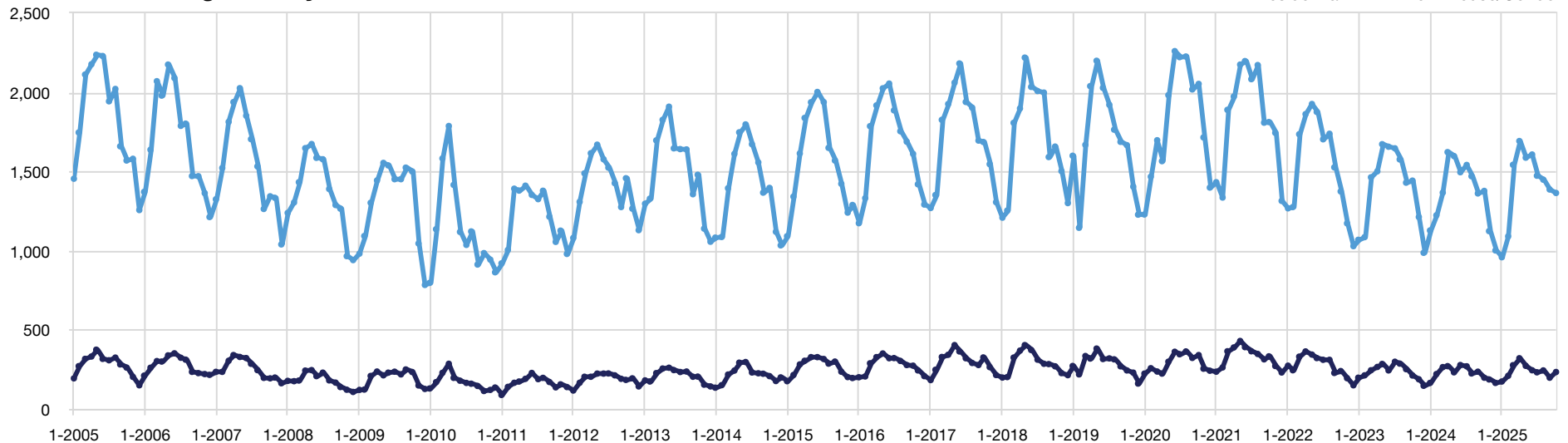


## Year to Date



Pending Sales	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Nov-2024	1,123	- 7.3%	186	- 0.5%
Dec-2024	1,001	+ 1.5%	164	+ 12.3%
Jan-2025	958	- 15.0%	173	+ 5.5%
Feb-2025	1,090	- 10.9%	209	- 5.0%
Mar-2025	1,542	+ 12.9%	276	+ 4.5%
Apr-2025	1,692	+ 4.3%	320	+ 18.5%
May-2025	1,587	- 0.6%	272	+ 17.7%
Jun-2025	1,607	+ 7.5%	244	- 11.9%
Jul-2025	1,473	- 4.4%	231	- 14.1%
Aug-2025	1,448	- 1.5%	243	+ 8.5%
Sep-2025	1,386	+ 1.8%	197	- 16.2%
<b>Oct-2025</b>	<b>1,364</b>	<b>- 0.9%</b>	<b>233</b>	<b>+ 18.3%</b>
12-Month Avg	1,356	- 0.7%	229	+ 2.2%

## Historical Pending Sales by Month

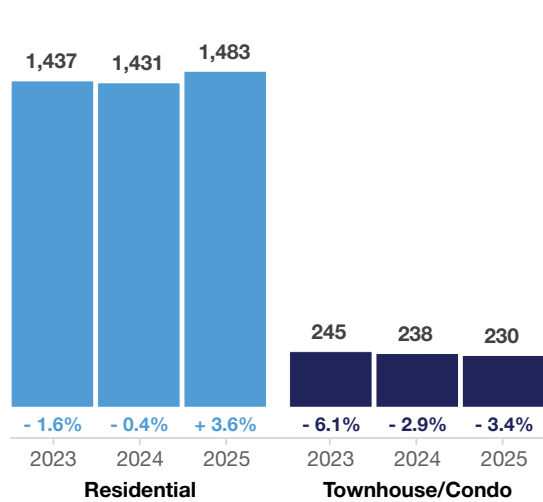


# Closed Sales

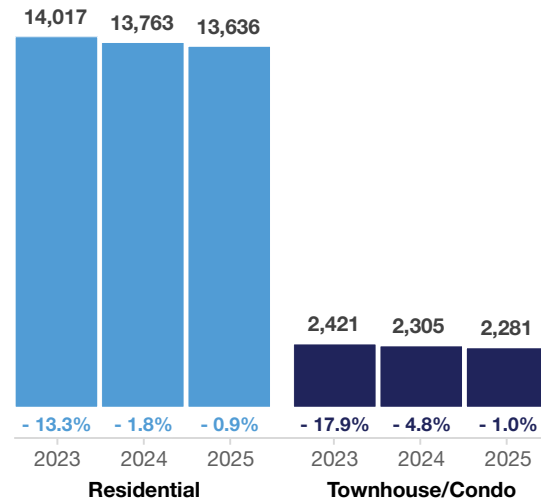
A count of the actual sales that closed in a given month.



## October

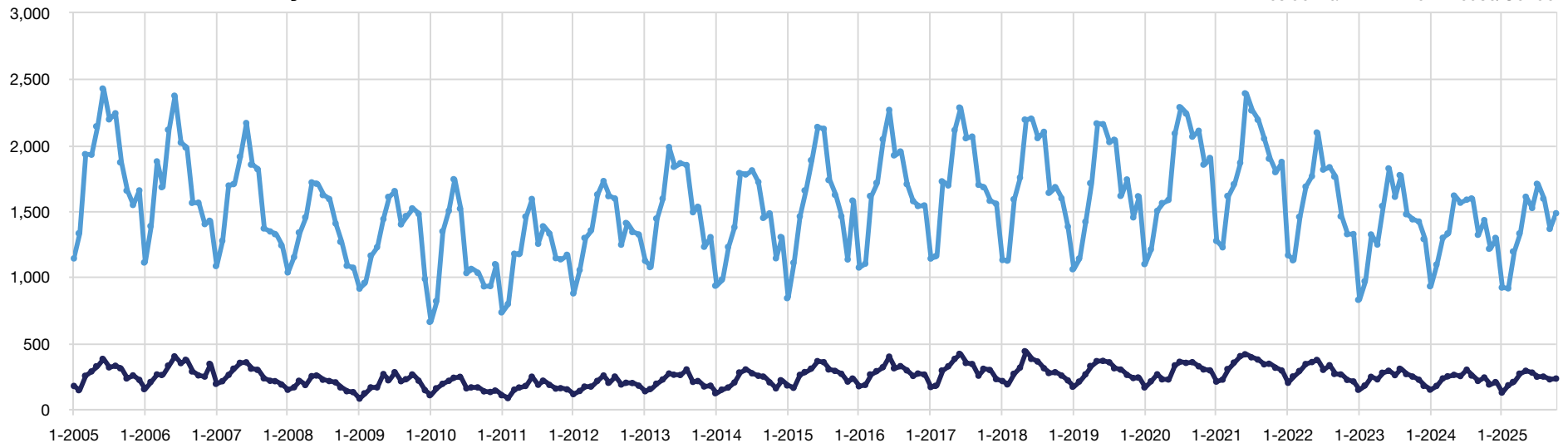


## Year to Date



Closed Sales	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Nov-2024	1,214	-14.5%	185	-16.3%
Dec-2024	1,296	+0.6%	203	+16.0%
Jan-2025	920	-1.1%	124	-15.1%
Feb-2025	914	-16.5%	179	+2.9%
Mar-2025	1,193	-8.0%	204	-11.7%
Apr-2025	1,330	0.0%	267	+8.1%
May-2025	1,608	-0.6%	289	+12.0%
Jun-2025	1,523	-2.6%	275	+10.4%
Jul-2025	1,706	+7.6%	244	-17.8%
Aug-2025	1,594	-0.1%	245	-3.2%
Sep-2025	1,365	+3.4%	224	+5.7%
<b>Oct-2025</b>	<b>1,483</b>	<b>+3.6%</b>	<b>230</b>	<b>-3.4%</b>
12-Month Avg	1,346	-2.0%	222	-1.3%

## Historical Closed Sales by Month

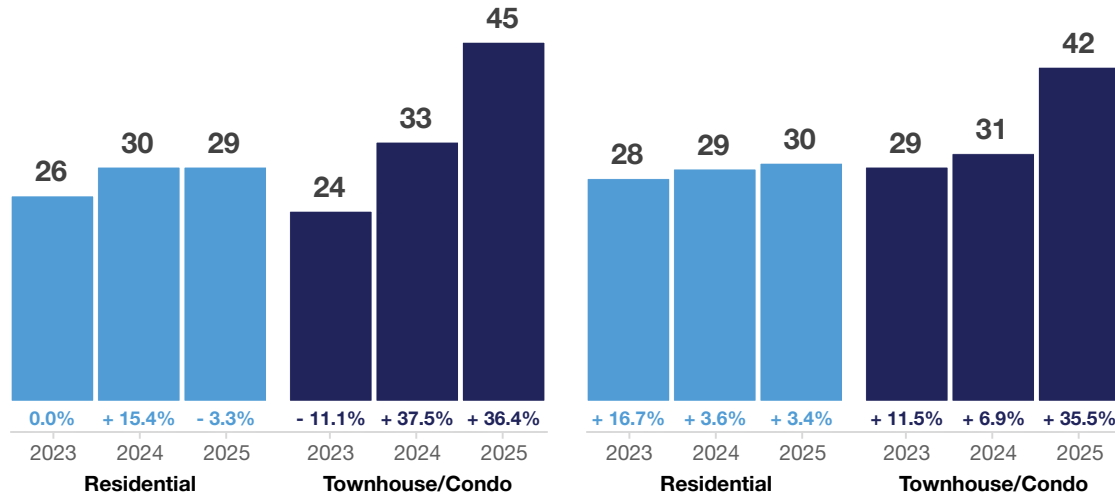


# Days on Market Until Sale

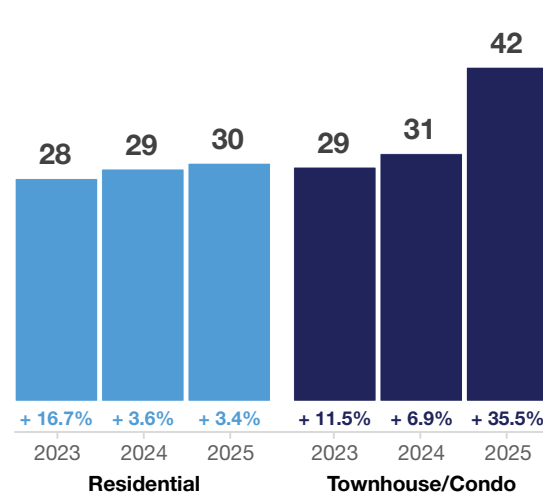
Average number of days between when a property is listed and when an offer is accepted in a given month.



## October



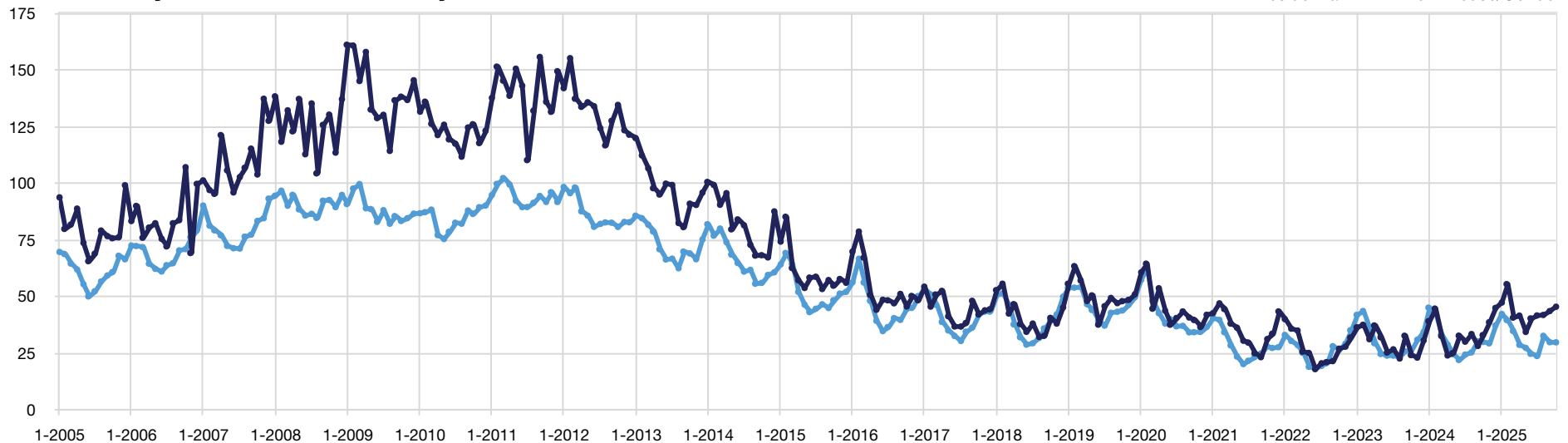
## Year to Date



Days on Market	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Nov-2024	29	- 6.5%	38	+ 65.2%
Dec-2024	37	+ 8.8%	45	+ 50.0%
Jan-2025	42	- 6.7%	47	+ 20.5%
Feb-2025	39	- 7.1%	55	+ 25.0%
Mar-2025	34	+ 3.0%	40	+ 25.0%
Apr-2025	28	0.0%	41	+ 70.8%
May-2025	27	+ 12.5%	34	+ 36.0%
Jun-2025	24	+ 9.1%	40	+ 25.0%
Jul-2025	23	- 4.2%	41	+ 36.7%
Aug-2025	32	+ 28.0%	42	+ 27.3%
Sep-2025	29	- 3.3%	43	+ 53.6%
<b>Oct-2025</b>	<b>29</b>	<b>- 3.3%</b>	<b>45</b>	<b>+ 36.4%</b>
12-Month Avg*	30	+ 2.7%	42	+ 38.0%

\* 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

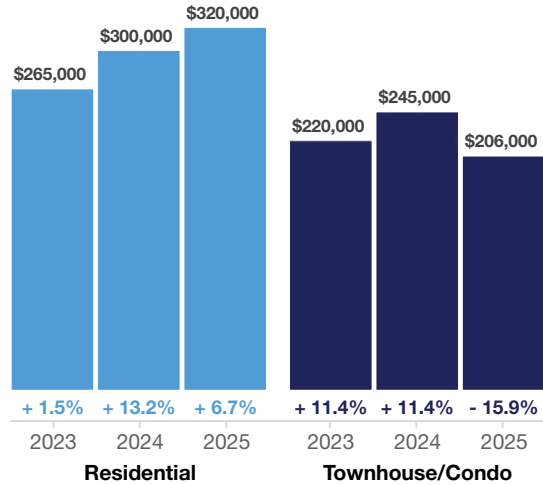


# Median Sales Price

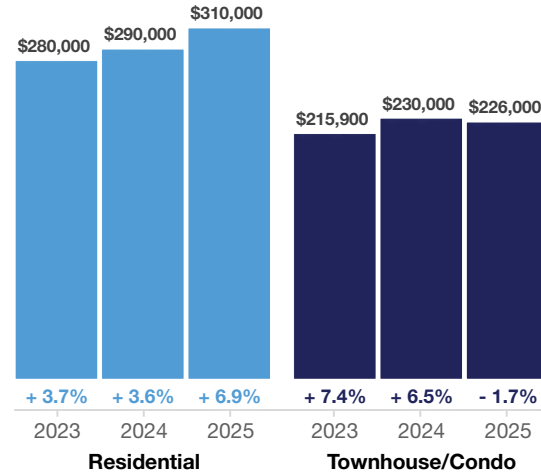
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



## October



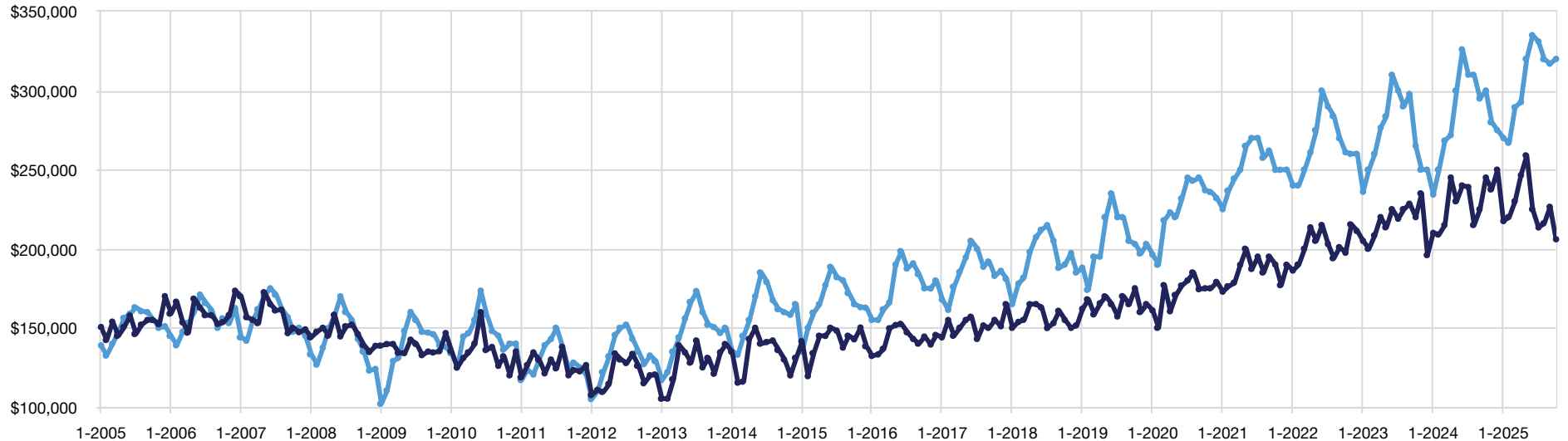
## Year to Date



Median Sales Price	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Nov-2024	\$280,000	+ 12.0%	\$237,500	+ 1.1%
Dec-2024	\$275,000	+ 10.0%	\$250,000	+ 27.6%
Jan-2025	\$270,000	+ 15.3%	\$217,500	+ 3.6%
Feb-2025	\$266,963	+ 6.8%	\$220,000	+ 5.3%
Mar-2025	\$289,450	+ 7.9%	\$230,000	+ 7.0%
Apr-2025	\$292,750	+ 7.7%	\$246,500	+ 0.6%
May-2025	\$320,000	+ 6.7%	\$259,000	+ 12.6%
Jun-2025	\$335,000	+ 2.8%	\$225,000	- 6.3%
Jul-2025	\$331,000	+ 6.8%	\$213,500	- 10.7%
Aug-2025	\$319,845	+ 3.2%	\$216,000	+ 0.5%
Sep-2025	\$317,000	+ 7.5%	\$226,500	+ 0.7%
<b>Oct-2025</b>	<b>\$320,000</b>	<b>+ 6.7%</b>	<b>\$206,000</b>	<b>- 15.9%</b>
12-Month Avg*	\$305,000	+ 8.2%	\$230,000	+ 1.3%

\* 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

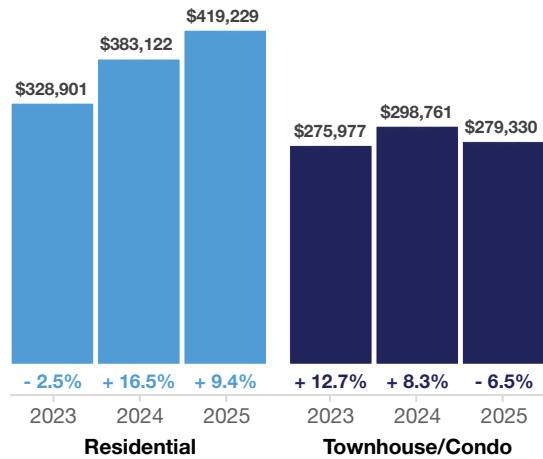


# Average Sales Price

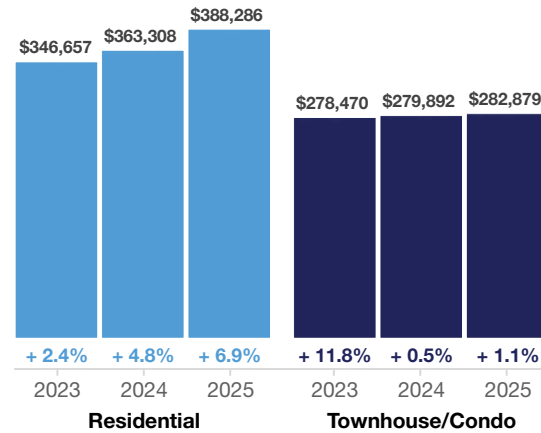
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



## October



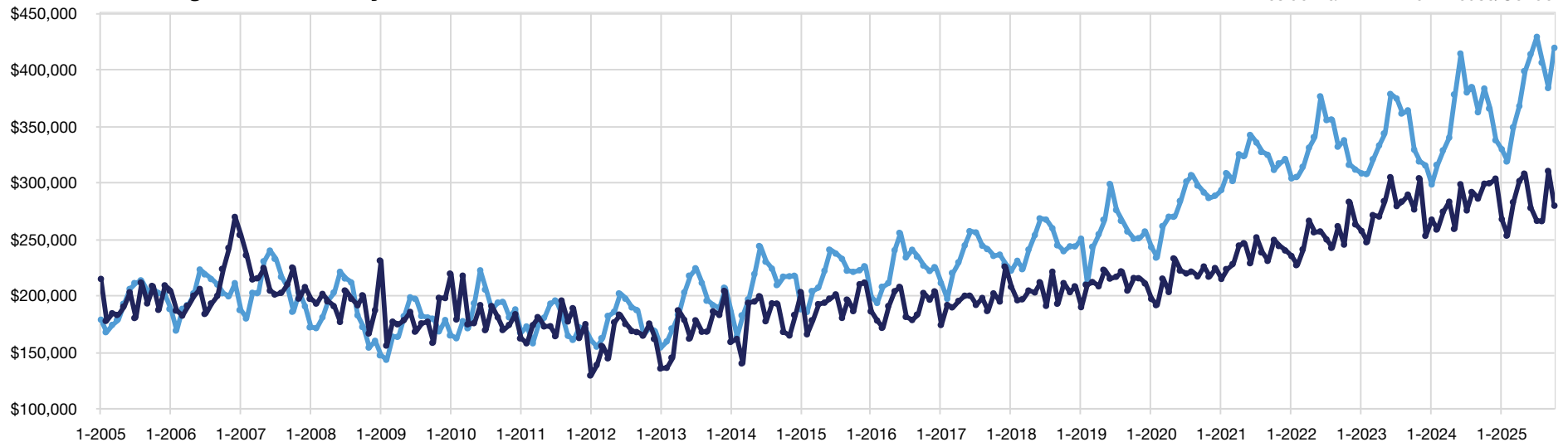
## Year to Date



Avg. Sales Price	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Nov-2024	\$365,431	+ 14.7%	\$299,180	- 1.5%
Dec-2024	\$337,334	+ 7.1%	\$303,280	+ 20.1%
Jan-2025	\$329,307	+ 10.5%	\$267,302	+ 0.1%
Feb-2025	\$318,484	+ 1.0%	\$252,770	- 2.1%
Mar-2025	\$348,782	+ 6.2%	\$282,408	+ 3.1%
Apr-2025	\$367,614	+ 8.2%	\$301,129	+ 6.5%
May-2025	\$398,582	+ 5.5%	\$307,704	+ 18.9%
Jun-2025	\$413,587	- 0.1%	\$277,371	- 7.0%
Jul-2025	\$428,940	+ 13.0%	\$265,896	- 3.3%
Aug-2025	\$406,103	+ 5.6%	\$265,619	- 8.8%
Sep-2025	\$383,604	+ 5.9%	\$310,061	+ 8.6%
<b>Oct-2025</b>	<b>\$419,229</b>	<b>+ 9.4%</b>	<b>\$279,330</b>	<b>- 6.5%</b>
12-Month Avg*	\$382,482	+ 7.5%	\$285,563	+ 2.0%

\* 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

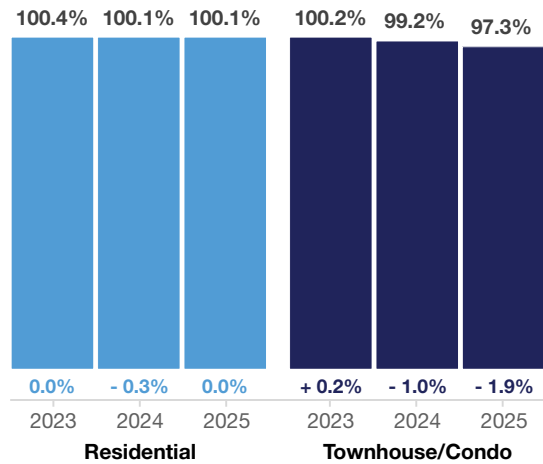


# Percent of List Price Received

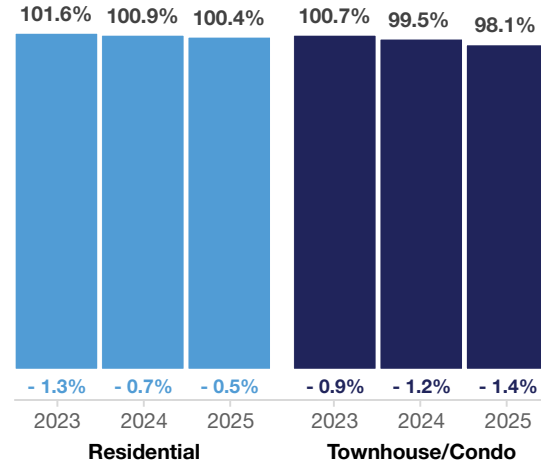
Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



## October



## Year to Date



Pct. of List Price Received	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Nov-2024	99.4%	- 0.3%	98.5%	- 2.0%
Dec-2024	98.8%	- 0.3%	98.1%	- 1.3%
Jan-2025	98.5%	+ 0.2%	97.2%	- 1.0%
Feb-2025	99.0%	0.0%	98.1%	- 0.8%
Mar-2025	99.8%	- 1.1%	98.5%	- 1.1%
Apr-2025	100.9%	- 0.7%	99.2%	- 1.2%
May-2025	101.1%	- 0.9%	98.6%	- 1.5%
Jun-2025	101.3%	- 1.0%	98.3%	- 1.2%
Jul-2025	101.1%	- 0.6%	98.5%	- 1.2%
Aug-2025	100.5%	- 0.6%	97.7%	- 1.6%
Sep-2025	100.2%	+ 0.2%	97.4%	- 1.6%
<b>Oct-2025</b>	<b>100.1%</b>	<b>0.0%</b>	<b>97.3%</b>	<b>- 1.9%</b>
12-Month Avg*	100.2%	- 0.4%	98.2%	- 1.4%

\* 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

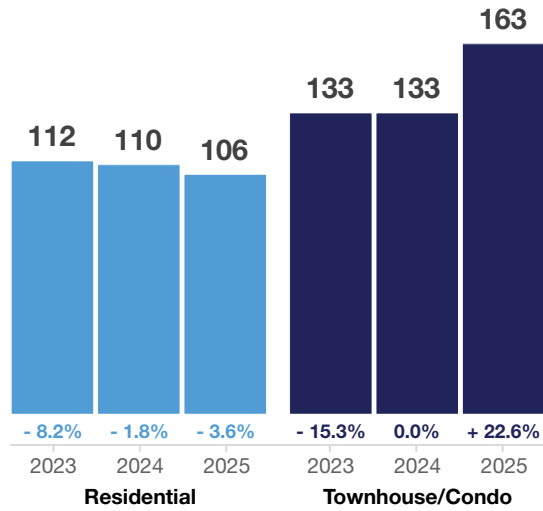


# Housing Affordability Index

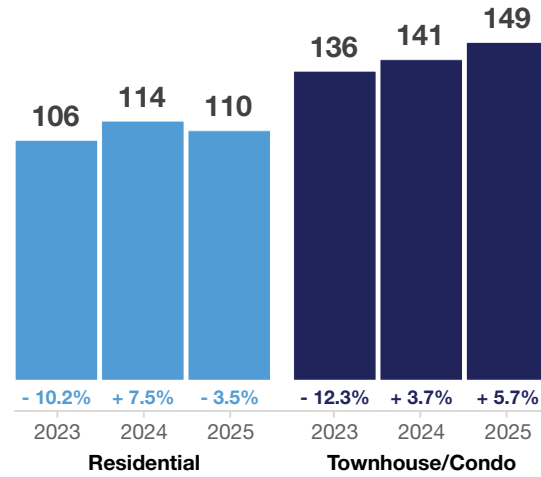


This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.

## October

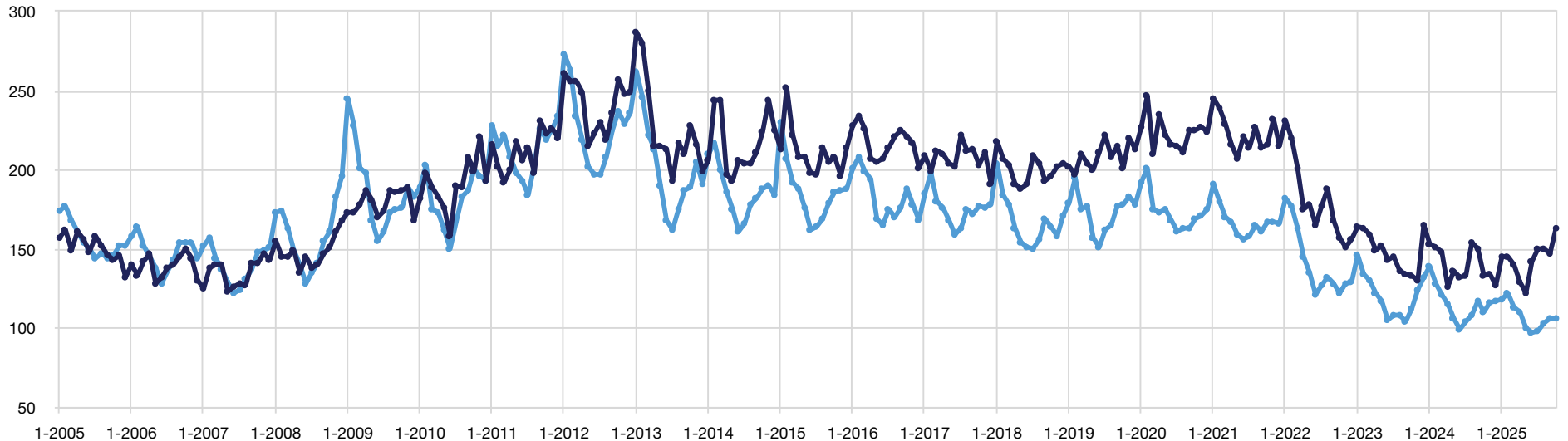


## Year to Date



Affordability Index	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Nov-2024	116	- 6.5%	134	+ 3.1%
Dec-2024	117	- 11.4%	127	- 23.0%
Jan-2025	118	- 15.1%	145	- 5.2%
Feb-2025	122	- 4.7%	145	- 4.0%
Mar-2025	113	- 6.6%	140	- 5.4%
Apr-2025	110	- 4.3%	129	+ 2.4%
May-2025	100	- 5.7%	122	- 10.3%
Jun-2025	97	- 2.0%	142	+ 7.6%
Jul-2025	98	- 5.8%	150	+ 12.8%
Aug-2025	103	- 4.6%	150	- 2.6%
Sep-2025	106	- 9.4%	147	- 2.0%
<b>Oct-2025</b>	<b>106</b>	<b>- 3.6%</b>	<b>163</b>	<b>+ 22.6%</b>
12-Month Avg	109	- 6.8%	141	- 1.4%

## Historical Housing Affordability Index by Month

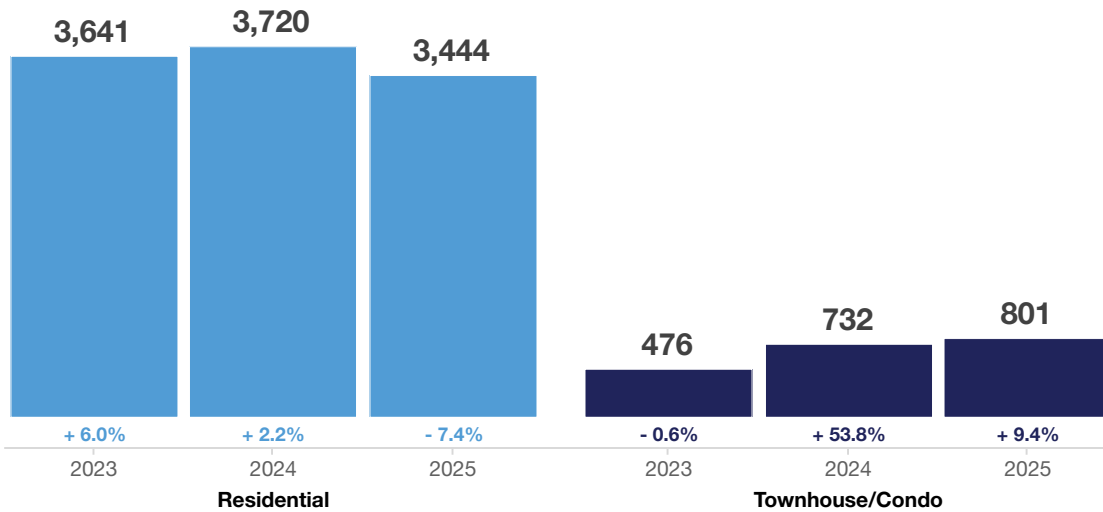


# Inventory of Homes for Sale

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

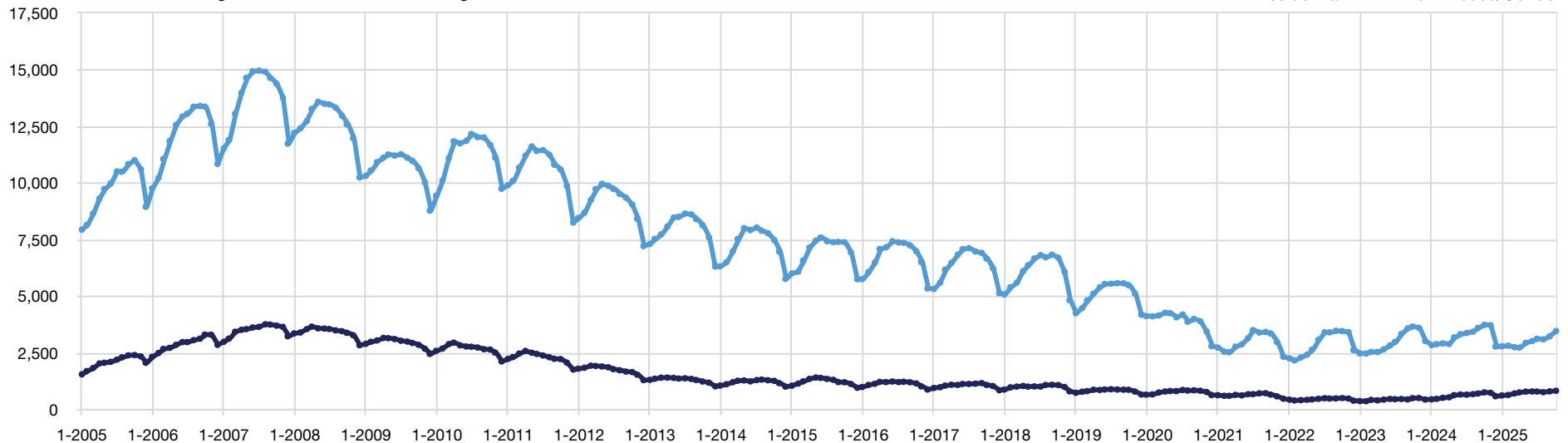


## October



Homes for Sale	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Nov-2024	3,700	+ 3.2%	711	+ 47.5%
Dec-2024	2,756	- 8.2%	558	+ 35.4%
Jan-2025	2,769	- 2.0%	594	+ 40.4%
Feb-2025	2,795	- 2.4%	616	+ 38.7%
Mar-2025	2,723	- 6.0%	685	+ 39.8%
Apr-2025	2,710	- 5.5%	730	+ 41.7%
May-2025	2,922	- 7.6%	763	+ 25.5%
Jun-2025	3,000	- 9.2%	771	+ 21.2%
Jul-2025	3,100	- 7.7%	767	+ 21.9%
Aug-2025	3,076	- 9.9%	739	+ 13.2%
Sep-2025	3,208	- 10.4%	775	+ 13.8%
<b>Oct-2025</b>	<b>3,444</b>	<b>- 7.4%</b>	<b>801</b>	<b>+ 9.4%</b>
12-Month Avg	3,017	- 6.2%	709	+ 26.8%

## Historical Inventory of Homes for Sale by Month

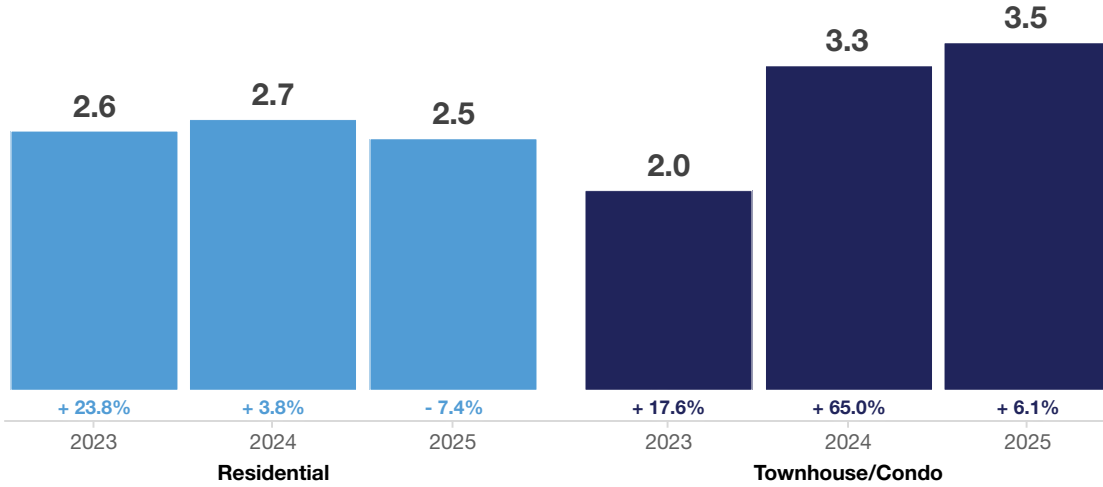


# Months Supply of Inventory

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.



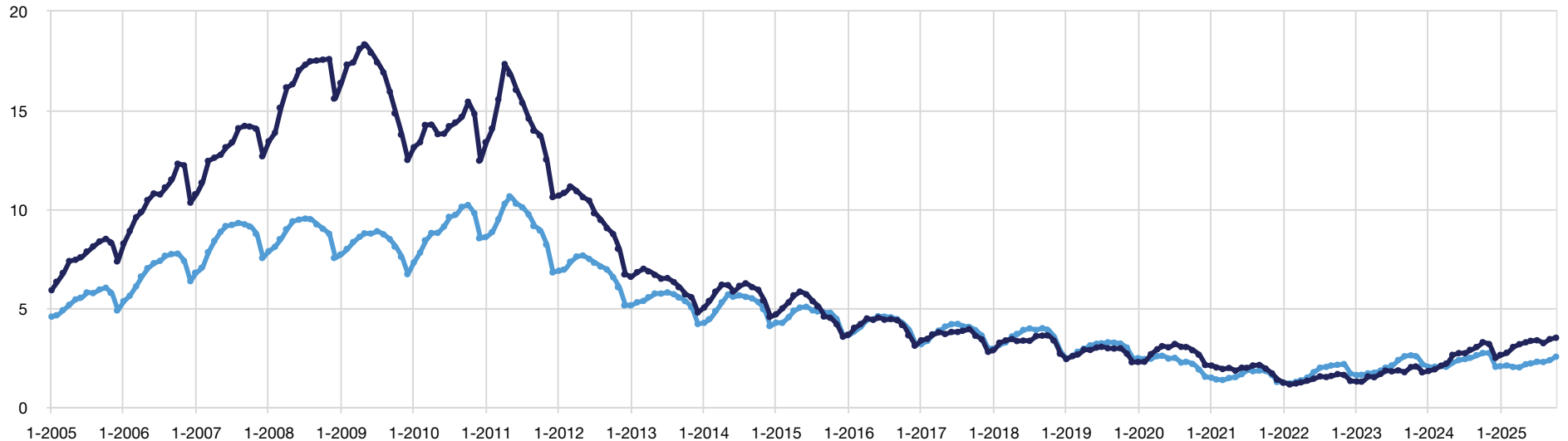
## October



Months Supply	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Nov-2024	2.7	+ 3.8%	3.2	+ 60.0%
Dec-2024	2.0	- 9.1%	2.5	+ 38.9%
Jan-2025	2.1	+ 5.0%	2.6	+ 44.4%
Feb-2025	2.1	+ 5.0%	2.7	+ 42.1%
Mar-2025	2.0	- 4.8%	3.0	+ 42.9%
Apr-2025	2.0	0.0%	3.2	+ 45.5%
May-2025	2.2	0.0%	3.3	+ 26.9%
Jun-2025	2.2	- 8.3%	3.3	+ 22.2%
Jul-2025	2.3	- 4.2%	3.4	+ 25.9%
Aug-2025	2.3	- 8.0%	3.2	+ 10.3%
Sep-2025	2.4	- 7.7%	3.4	+ 13.3%
<b>Oct-2025</b>	<b>2.5</b>	<b>- 7.4%</b>	<b>3.5</b>	<b>+ 6.1%</b>
12-Month Avg*	2.2	- 3.5%	3.1	+ 28.6%

\* 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



# All Residential Properties Market Overview

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
<b>New Listings</b>		2,184	<b>2,350</b>	+ 7.6%	20,813	<b>21,798</b>	+ 4.7%
<b>Pending Sales</b>		1,579	<b>1,606</b>	+ 1.7%	16,595	<b>16,637</b>	+ 0.3%
<b>Closed Sales</b>		1,671	<b>1,725</b>	+ 3.2%	16,132	<b>16,008</b>	- 0.8%
<b>Days on Market Until Sale</b>		30	<b>32</b>	+ 6.7%	30	<b>32</b>	+ 6.7%
<b>Median Sales Price</b>		\$289,900	<b>\$305,862</b>	+ 5.5%	\$278,000	<b>\$295,700</b>	+ 6.4%
<b>Average Sales Price</b>		\$370,846	<b>\$399,144</b>	+ 7.6%	\$350,505	<b>\$372,046</b>	+ 6.1%
<b>Percent of List Price Received</b>		99.9%	<b>99.6%</b>	- 0.3%	100.7%	<b>100.0%</b>	- 0.7%
<b>Housing Affordability Index</b>		114	<b>111</b>	- 2.6%	119	<b>115</b>	- 3.4%
<b>Inventory of Homes for Sale</b>		4,479	<b>4,283</b>	- 4.4%	—	—	—
<b>Months Supply of Inventory</b>		2.8	<b>2.7</b>	- 3.6%	—	—	—