

Monthly Indicators



July 2026

U.S. existing-home sales declined 2.4% from the previous month to a seasonally adjusted annual rate of 4.09 million units, according to the National Association of REALTORS® (NAR). Regionally, sales increased in the Northeast but declined in the West, South, and Midwest. Compared to a year earlier, existing-home sales rose 2.8%, with gains in the Midwest, South, and West while remaining unchanged in the Northeast.

New Listings increased 11.6 percent for Residential homes and 8.5 percent for Townhouse/Condo homes. Pending Sales decreased 1.4 percent for Residential homes and 6.5 percent for Townhouse/Condo homes. Inventory increased 15.2 percent for Residential homes and 9.2 percent for Townhouse/Condo homes.

Median Sales Price increased 5.9 percent to \$350,000 for Residential homes and 6.3 percent to \$227,000 for Townhouse/Condo homes. Days on Market remained flat for Residential homes but increased 24.4 percent for Townhouse/Condo properties. Months Supply of Inventory increased 13.0 percent for Residential homes and 15.2 percent for Townhouse/Condo homes.

Nationally, the median existing-home price hit a new record of \$440,600, a 1.8% increase from a year earlier, NAR reported. Home prices have now increased on an annual basis for 36 consecutive months, reflecting continued demand despite inventory remaining below historically balanced levels. Heading into July, there were 1.56 million properties for sale, down 0.6% month-over-month but up 1.3% from the same period last year, representing a 4.6-month supply at the current sales pace. Homes spent a median of 28 days on the market, with first-time homebuyers accounting for 33% of home purchases.

Quick Facts

- 5.1%

Change in
Closed Sales
All Properties

+ 6.4%

Change in
Median Sales Price
All Properties

+ 13.7%

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	7-2025	7-2026	% Change	YTD 2025	YTD 2026	% Change
New Listings		1,902	2,123	+ 11.6%	12,565	12,884	+ 2.5%
Pending Sales		1,472	1,451	- 1.4%	9,925	9,882	- 0.4%
Closed Sales		1,709	1,614	- 5.6%	9,206	9,224	+ 0.2%
Days on Market Until Sale		23	23	0.0%	30	31	+ 3.3%
Median Sales Price		\$330,400	\$350,000	+ 5.9%	\$305,000	\$326,000	+ 6.9%
Average Sales Price		\$428,935	\$445,706	+ 3.9%	\$380,975	\$412,682	+ 8.3%
Percent of List Price Received		101.0%	101.4%	+ 0.4%	100.5%	100.5%	0.0%
Housing Affordability Index		103	97	- 5.8%	111	105	- 5.4%
Inventory of Homes for Sale		3,092	3,563	+ 15.2%	—	—	—
Months Supply of Inventory		2.3	2.6	+ 13.0%	—	—	—

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.



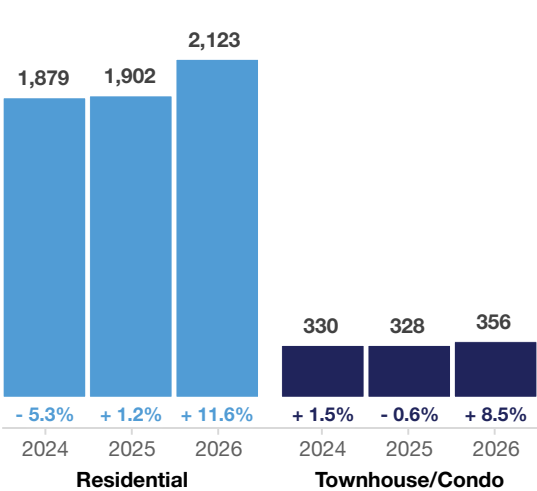
Key Metrics	Historical Sparkbars	7-2025	7-2026	% Change	YTD 2025	YTD 2026	% Change
New Listings		328	356	+ 8.5%	2,501	2,358	- 5.7%
Pending Sales		231	216	- 6.5%	1,728	1,632	- 5.6%
Closed Sales		244	242	- 0.8%	1,584	1,582	- 0.1%
Days on Market Until Sale		41	51	+ 24.4%	42	49	+ 16.7%
Median Sales Price		\$213,500	\$227,000	+ 6.3%	\$230,000	\$230,000	0.0%
Average Sales Price		\$265,896	\$266,892	+ 0.4%	\$282,528	\$293,205	+ 3.8%
Percent of List Price Received		98.5%	97.9%	- 0.6%	98.4%	98.2%	- 0.2%
Housing Affordability Index		157	148	- 5.7%	145	146	+ 0.7%
Inventory of Homes for Sale		760	830	+ 9.2%	—	—	—
Months Supply of Inventory		3.3	3.8	+ 15.2%	—	—	—

New Listings

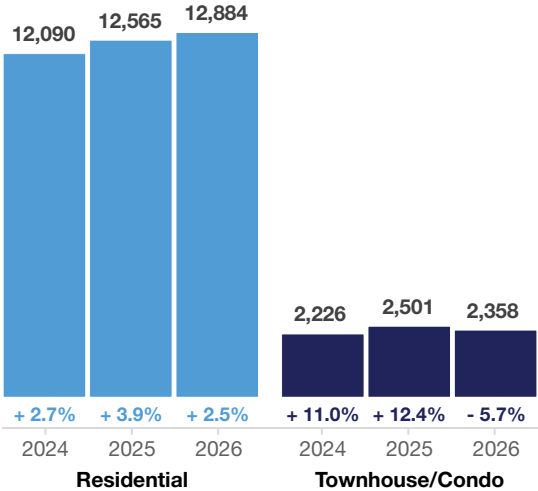
A count of the properties that have been newly listed on the market in a given month.



July

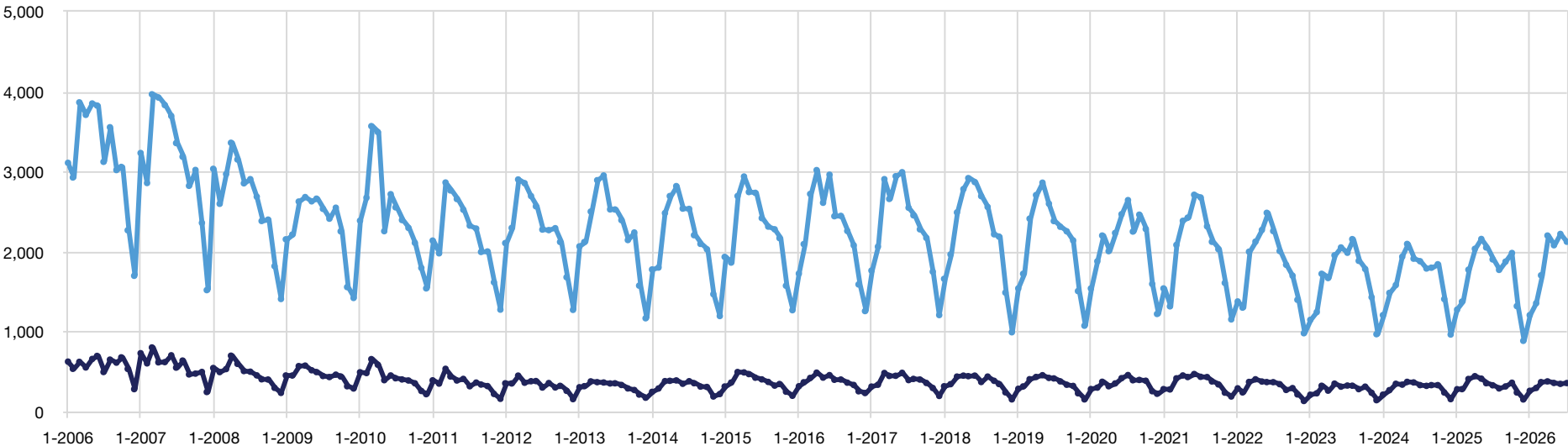


Year to Date



New Listings	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Aug-2025	1,771	- 1.0%	289	- 10.0%
Sep-2025	1,874	+ 4.2%	314	- 4.8%
Oct-2025	1,982	+ 7.7%	360	+ 9.1%
Nov-2025	1,318	- 6.3%	238	0.0%
Dec-2025	884	- 8.2%	151	- 2.6%
Jan-2026	1,205	- 5.4%	259	- 7.2%
Feb-2026	1,354	- 1.5%	295	+ 5.4%
Mar-2026	1,703	- 3.9%	368	- 9.6%
Apr-2026	2,200	+ 8.2%	377	- 14.7%
May-2026	2,079	- 3.6%	357	- 13.1%
Jun-2026	2,220	+ 8.2%	346	- 2.3%
Jul-2026	2,123	+ 11.6%	356	+ 8.5%
12-Month Avg	1,726	+ 1.7%	309	- 4.3%

Historical New Listings by Month

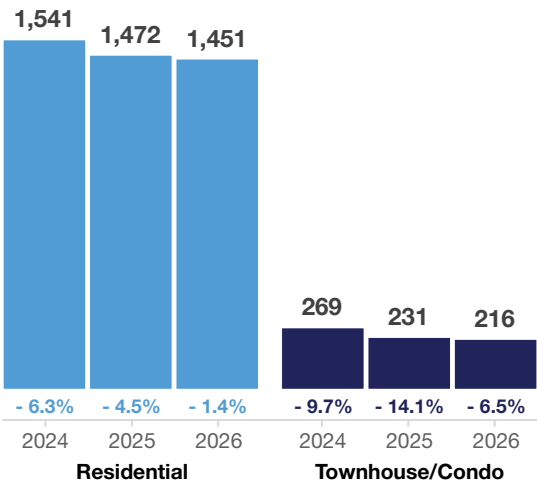


Pending Sales

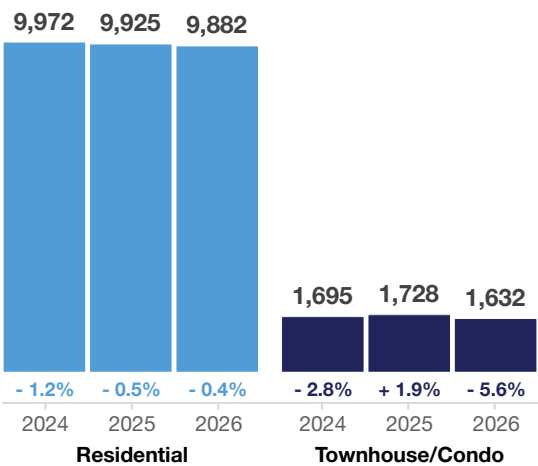
A count of the properties on which offers have been accepted in a given month.



July

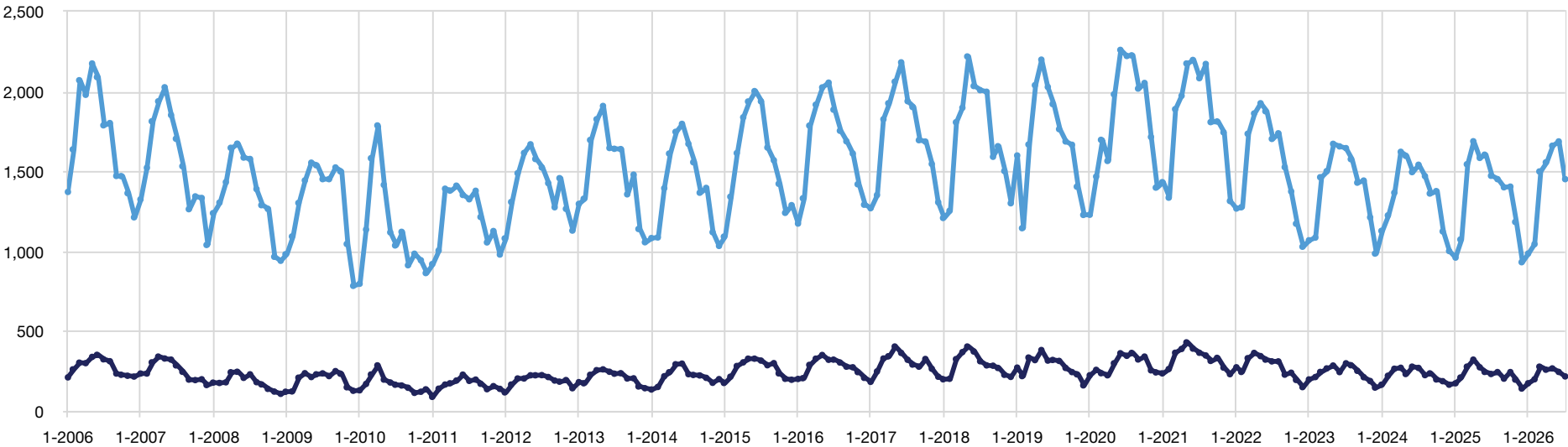


Year to Date



Pending Sales	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Aug-2025	1,451	- 1.3%	243	+ 8.5%
Sep-2025	1,400	+ 2.9%	202	- 14.0%
Oct-2025	1,404	+ 2.0%	243	+ 23.4%
Nov-2025	1,183	+ 5.2%	196	+ 5.4%
Dec-2025	931	- 7.0%	140	- 14.6%
Jan-2026	985	+ 2.6%	173	0.0%
Feb-2026	1,044	- 2.7%	198	- 5.3%
Mar-2026	1,499	- 2.9%	277	0.0%
Apr-2026	1,556	- 7.8%	258	- 19.6%
May-2026	1,660	+ 4.8%	266	- 2.6%
Jun-2026	1,687	+ 5.2%	244	0.0%
Jul-2026	1,451	- 1.4%	216	- 6.5%
12-Month Avg	1,354	- 0.1%	221	- 3.1%

Historical Pending Sales by Month

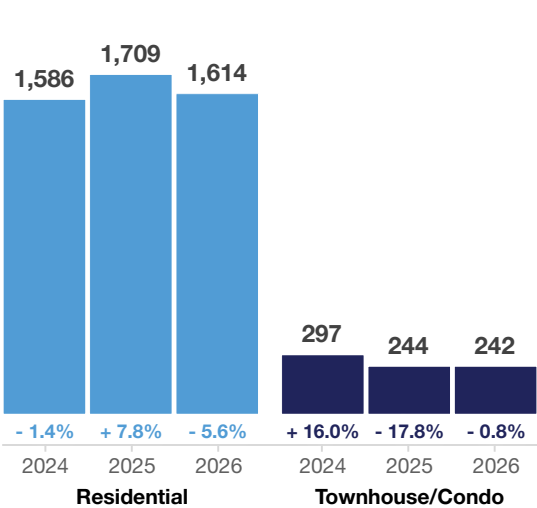


Closed Sales

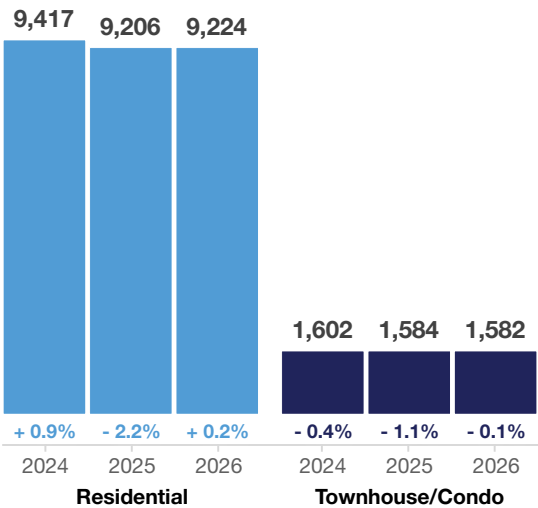
A count of the actual sales that closed in a given month.



July

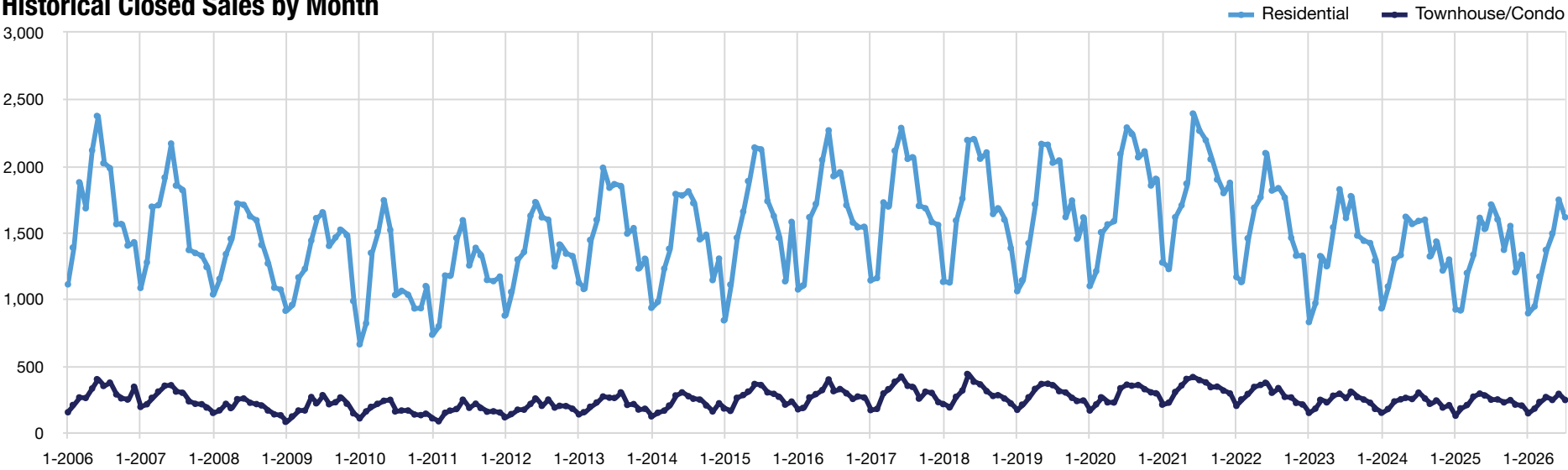


Year to Date



Closed Sales	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Aug-2025	1,598	+ 0.2%	246	- 2.8%
Sep-2025	1,369	+ 3.7%	224	+ 5.2%
Oct-2025	1,548	+ 8.2%	241	+ 1.3%
Nov-2025	1,201	- 1.1%	207	+ 11.9%
Dec-2025	1,331	+ 2.7%	200	- 1.5%
Jan-2026	893	- 3.0%	142	+ 14.5%
Feb-2026	944	+ 3.3%	177	- 1.1%
Mar-2026	1,168	- 2.3%	227	+ 11.3%
Apr-2026	1,368	+ 2.7%	264	- 1.1%
May-2026	1,492	- 7.3%	242	- 16.6%
Jun-2026	1,745	+ 14.4%	288	+ 4.3%
Jul-2026	1,614	- 5.6%	242	- 0.8%
12-Month Avg	1,356	+ 1.3%	225	+ 0.9%

Historical Closed Sales by Month



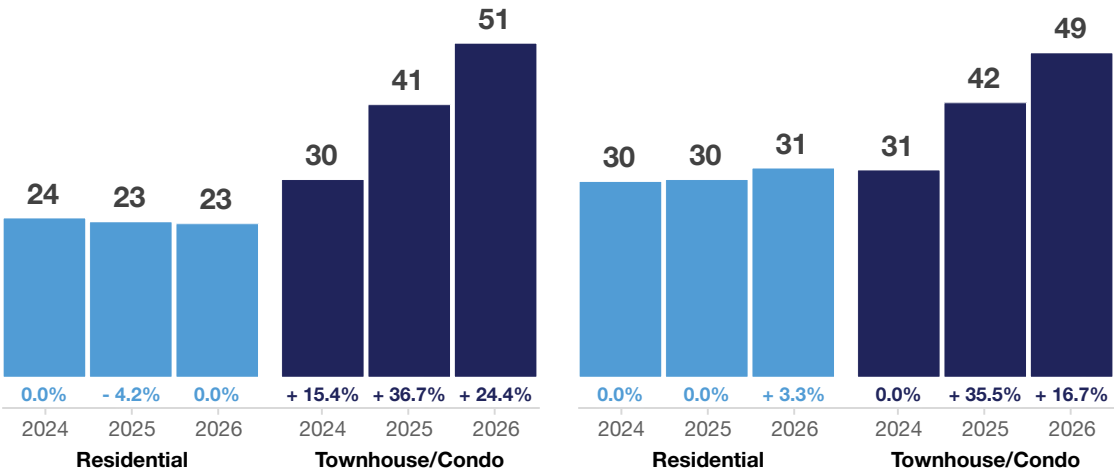
Days on Market Until Sale

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



July

Year to Date



Days on Market	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Aug-2025	32	+ 28.0%	42	+ 27.3%
Sep-2025	29	- 3.3%	43	+ 53.6%
Oct-2025	29	- 3.3%	45	+ 36.4%
Nov-2025	34	+ 17.2%	45	+ 18.4%
Dec-2025	37	0.0%	48	+ 6.7%
Jan-2026	47	+ 11.9%	53	+ 12.8%
Feb-2026	42	+ 7.7%	61	+ 10.9%
Mar-2026	38	+ 11.8%	51	+ 27.5%
Apr-2026	31	+ 10.7%	50	+ 22.0%
May-2026	26	- 3.7%	37	+ 8.8%
Jun-2026	26	+ 8.3%	45	+ 12.5%
Jul-2026	23	0.0%	51	+ 24.4%
12-Month Avg*	32	+ 6.7%	47	+ 21.0%

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

Historical Days on Market Until Sale by Month

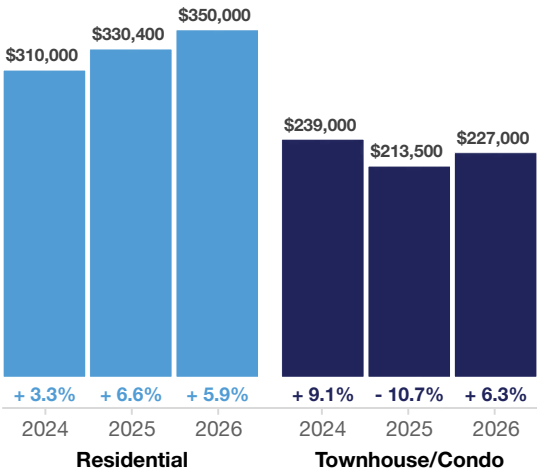


Median Sales Price

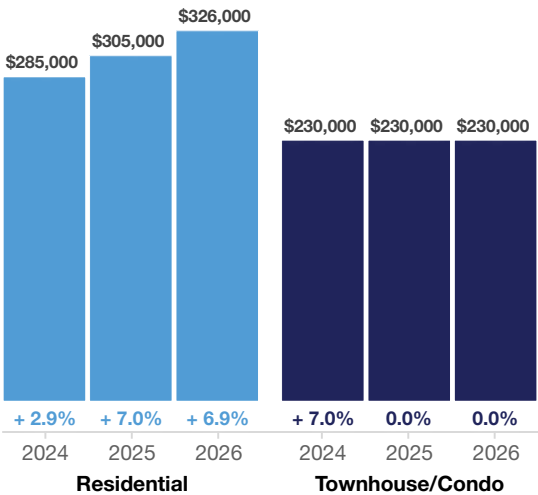
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



July



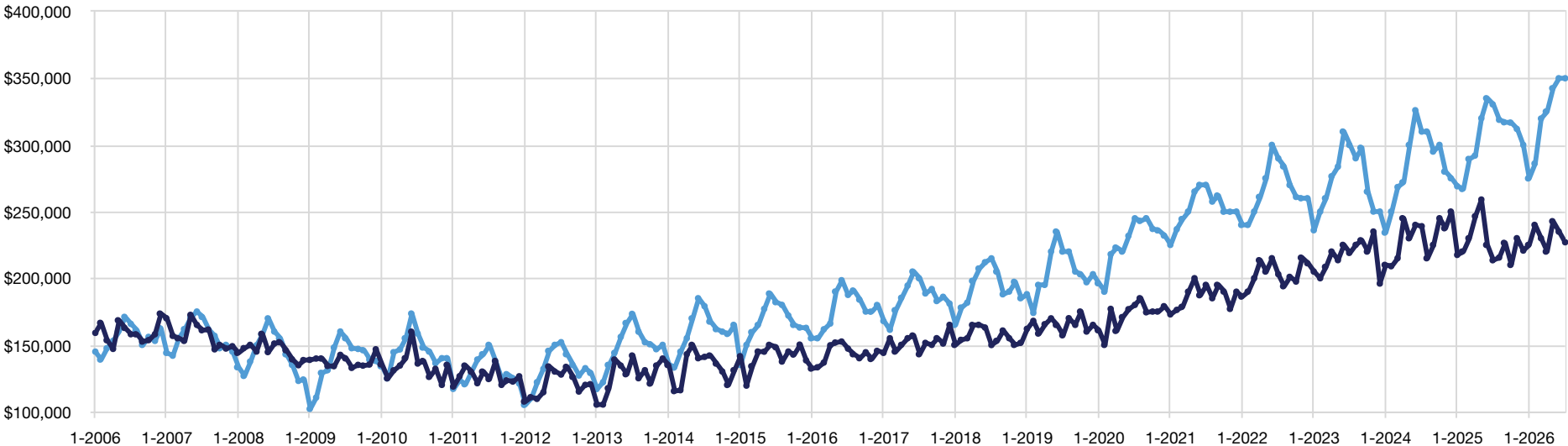
Year to Date



Median Sales Price	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Aug-2025	\$318,845	+ 2.9%	\$215,500	+ 0.2%
Sep-2025	\$317,000	+ 7.5%	\$226,500	+ 0.7%
Oct-2025	\$316,750	+ 5.6%	\$210,000	- 14.3%
Nov-2025	\$312,000	+ 11.4%	\$230,000	- 3.2%
Dec-2025	\$300,000	+ 9.1%	\$220,750	- 11.7%
Jan-2026	\$274,900	+ 2.2%	\$224,950	+ 3.4%
Feb-2026	\$286,000	+ 7.1%	\$240,000	+ 9.1%
Mar-2026	\$319,750	+ 10.5%	\$230,000	0.0%
Apr-2026	\$325,000	+ 11.3%	\$220,000	- 10.8%
May-2026	\$342,500	+ 7.0%	\$242,750	- 6.3%
Jun-2026	\$350,000	+ 4.5%	\$234,950	+ 4.4%
Jul-2026	\$350,000	+ 5.9%	\$227,000	+ 6.3%
12-Month Avg*	\$320,000	+ 6.7%	\$225,000	- 2.8%

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

Historical Median Sales Price by Month

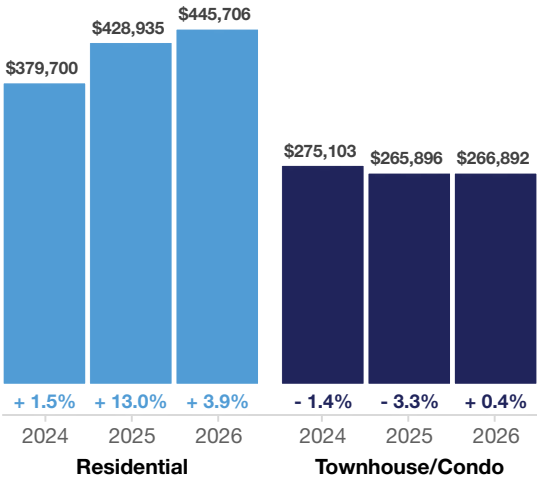


Average Sales Price

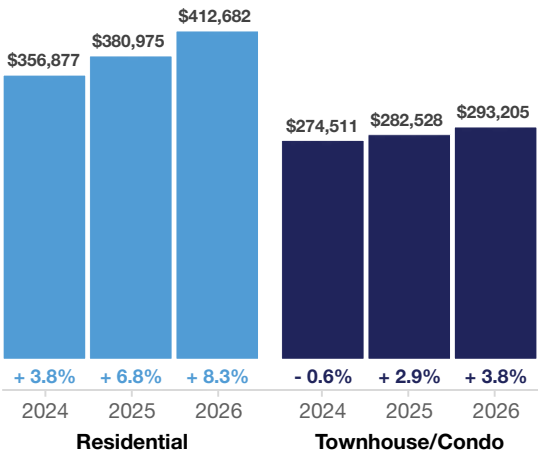
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



July



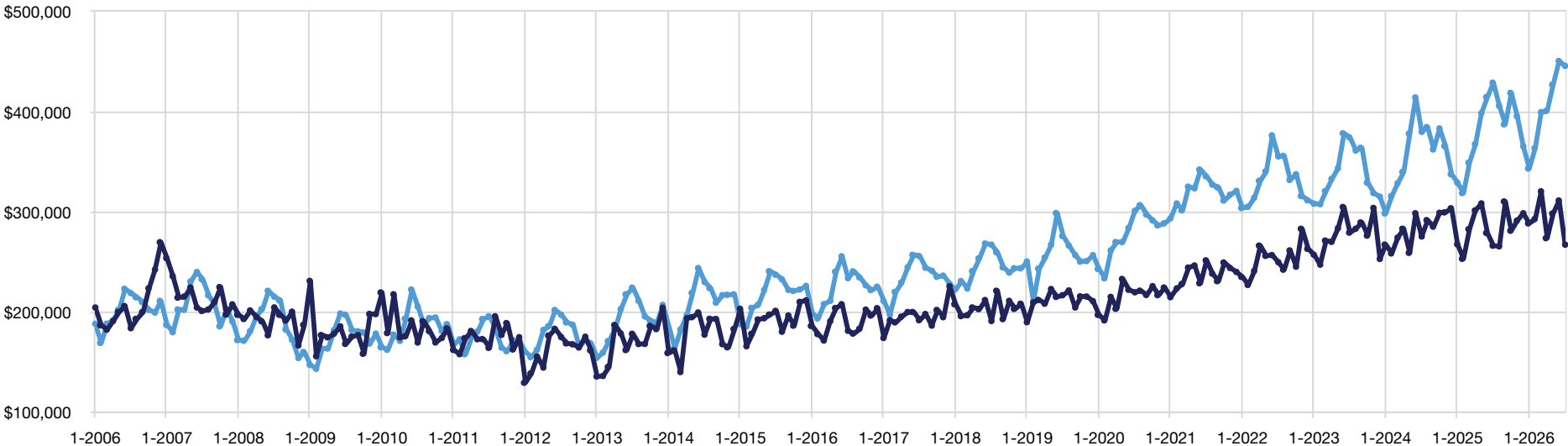
Year to Date



Avg. Sales Price	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Aug-2025	\$405,687	+ 5.5%	\$265,250	- 9.0%
Sep-2025	\$387,182	+ 6.9%	\$310,061	+ 8.8%
Oct-2025	\$418,683	+ 9.3%	\$280,837	- 6.0%
Nov-2025	\$395,333	+ 8.2%	\$290,918	- 2.8%
Dec-2025	\$365,314	+ 8.3%	\$298,307	- 1.6%
Jan-2026	\$343,068	+ 4.3%	\$288,204	+ 7.8%
Feb-2026	\$363,513	+ 14.1%	\$292,451	+ 15.7%
Mar-2026	\$399,383	+ 14.5%	\$320,227	+ 13.4%
Apr-2026	\$400,572	+ 9.0%	\$273,426	- 9.2%
May-2026	\$426,953	+ 7.2%	\$297,982	- 3.3%
Jun-2026	\$450,570	+ 8.7%	\$311,062	+ 11.6%
Jul-2026	\$445,706	+ 3.9%	\$266,892	+ 0.4%
12-Month Avg*	\$405,268	+ 8.0%	\$291,159	+ 1.2%

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

Historical Average Sales Price by Month



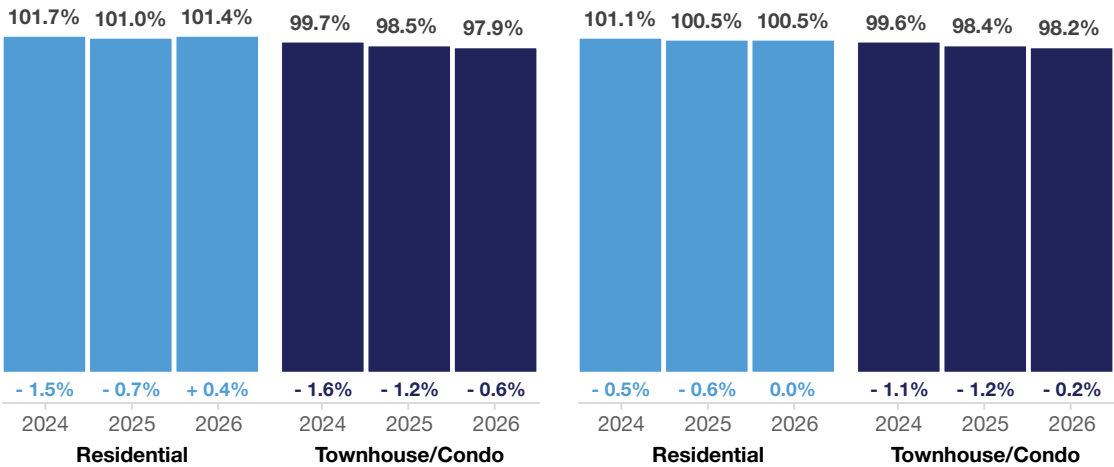
Percent of List Price Received



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.

July

Year to Date



Pct. of List Price Received	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Aug-2025	100.5%	- 0.6%	97.7%	- 1.6%
Sep-2025	100.2%	+ 0.2%	97.4%	- 1.6%
Oct-2025	100.0%	- 0.1%	97.4%	- 1.8%
Nov-2025	99.7%	+ 0.3%	98.7%	+ 0.2%
Dec-2025	98.9%	+ 0.1%	97.4%	- 0.7%
Jan-2026	98.0%	- 0.5%	97.2%	0.0%
Feb-2026	99.2%	+ 0.2%	97.6%	- 0.5%
Mar-2026	100.0%	+ 0.3%	97.7%	- 0.8%
Apr-2026	100.7%	- 0.2%	98.3%	- 0.9%
May-2026	101.2%	0.0%	98.9%	+ 0.3%
Jun-2026	101.4%	+ 0.1%	99.2%	+ 0.9%
Jul-2026	101.4%	+ 0.4%	97.9%	- 0.6%
12-Month Avg*	100.2%	+ 0.0%	98.0%	- 0.6%

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

Historical Percent of List Price Received by Month

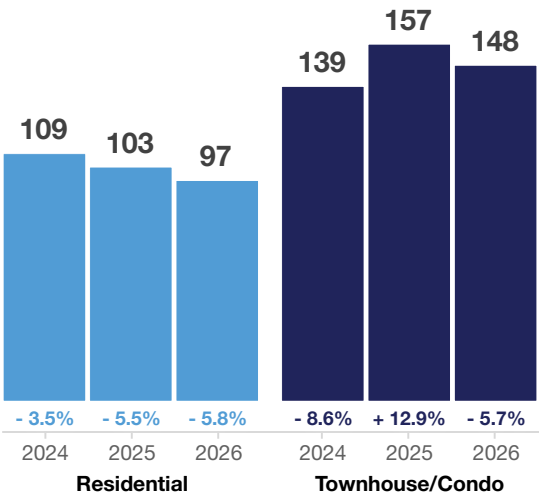


Housing Affordability Index

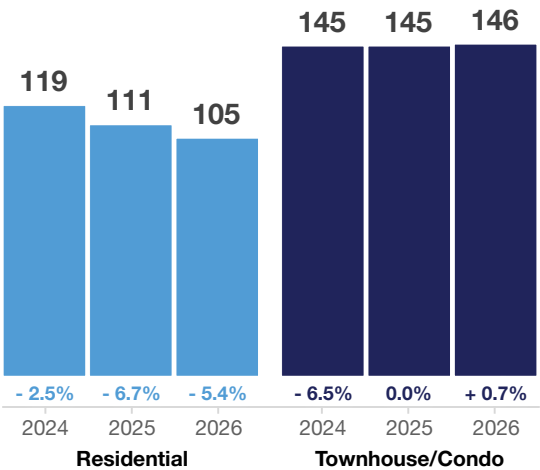
This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.



July

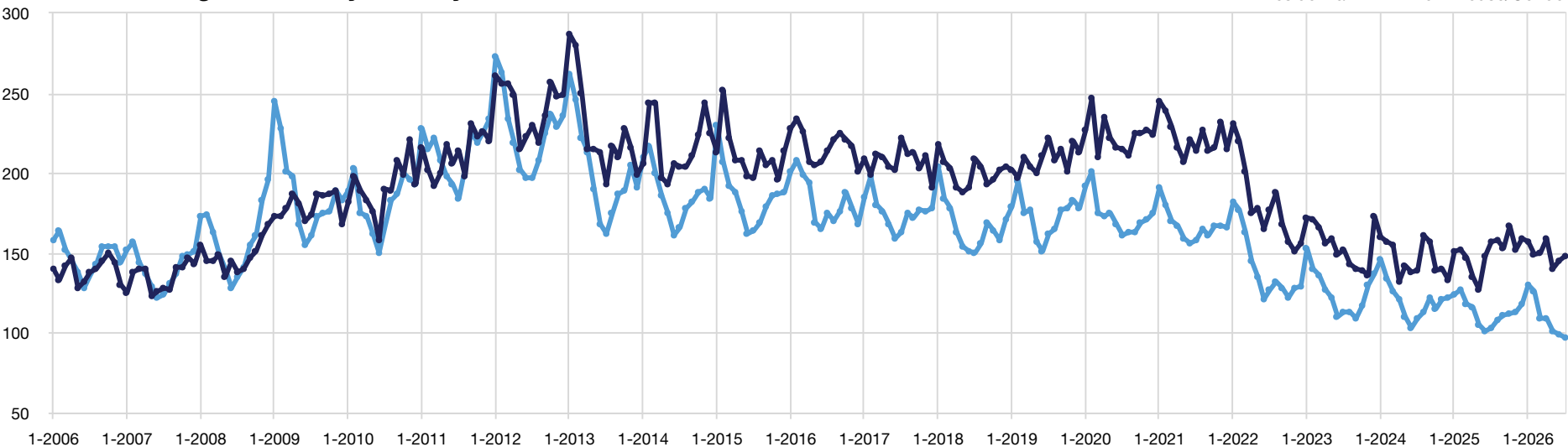


Year to Date



Affordability Index	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Aug-2025	108	- 4.4%	158	- 1.9%
Sep-2025	111	- 9.0%	153	- 2.5%
Oct-2025	112	- 2.6%	167	+ 20.1%
Nov-2025	113	- 6.6%	152	+ 8.6%
Dec-2025	118	- 3.3%	159	+ 19.5%
Jan-2026	130	+ 4.8%	157	+ 4.0%
Feb-2026	126	- 0.8%	149	- 2.0%
Mar-2026	109	- 7.6%	150	+ 2.0%
Apr-2026	109	- 6.0%	159	+ 17.8%
May-2026	101	- 3.8%	140	+ 10.2%
Jun-2026	99	- 2.0%	145	- 2.0%
Jul-2026	97	- 5.8%	148	- 5.7%
12-Month Avg	111	- 4.3%	153	+ 4.8%

Historical Housing Affordability Index by Month

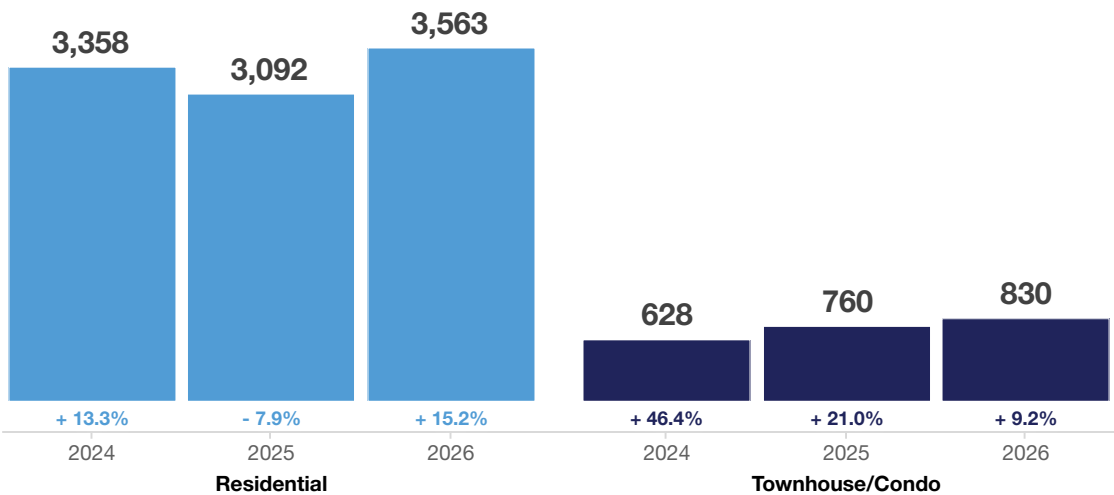


Inventory of Homes for Sale

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

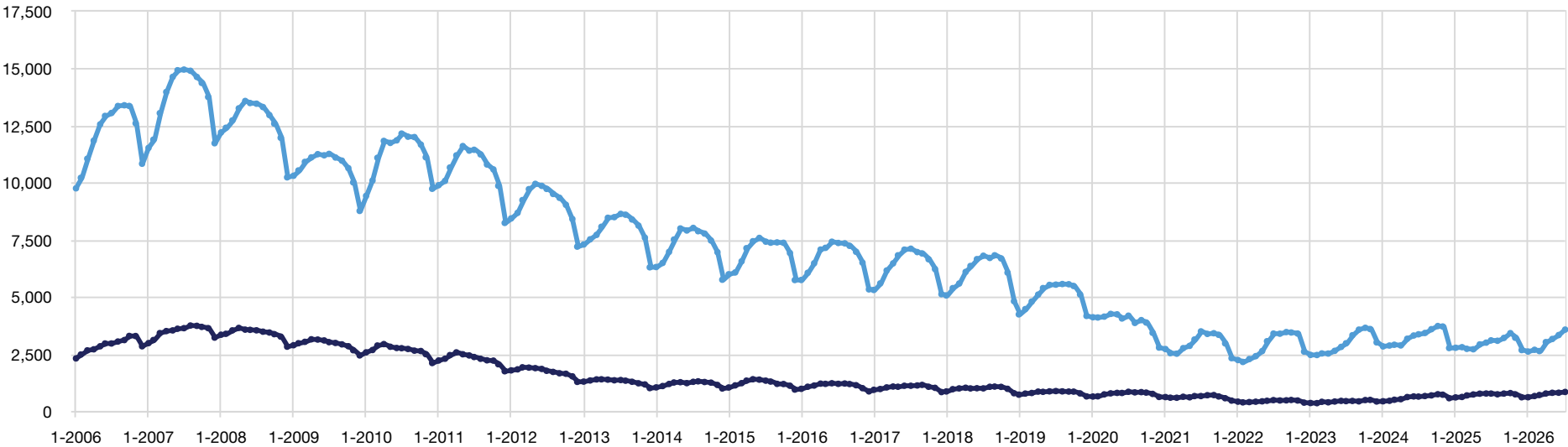


July



Homes for Sale	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Aug-2025	3,074	- 10.0%	728	+ 11.7%
Sep-2025	3,199	- 10.7%	760	+ 11.8%
Oct-2025	3,408	- 8.4%	781	+ 6.8%
Nov-2025	3,206	- 13.3%	727	+ 2.4%
Dec-2025	2,666	- 3.2%	598	+ 7.4%
Jan-2026	2,602	- 6.0%	600	+ 1.4%
Feb-2026	2,678	- 4.1%	652	+ 6.7%
Mar-2026	2,622	- 3.6%	697	+ 2.7%
Apr-2026	3,015	+ 11.6%	763	+ 5.8%
May-2026	3,152	+ 8.2%	794	+ 5.2%
Jun-2026	3,324	+ 11.1%	797	+ 4.5%
Jul-2026	3,563	+ 15.2%	830	+ 9.2%
12-Month Avg	3,042	- 1.7%	727	+ 6.3%

Historical Inventory of Homes for Sale by Month

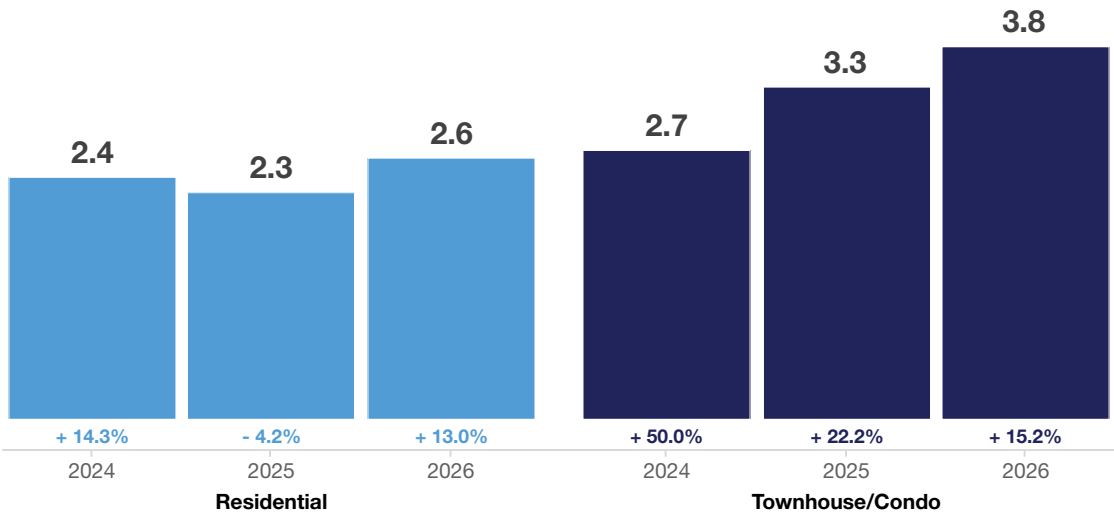


Months Supply of Inventory

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.



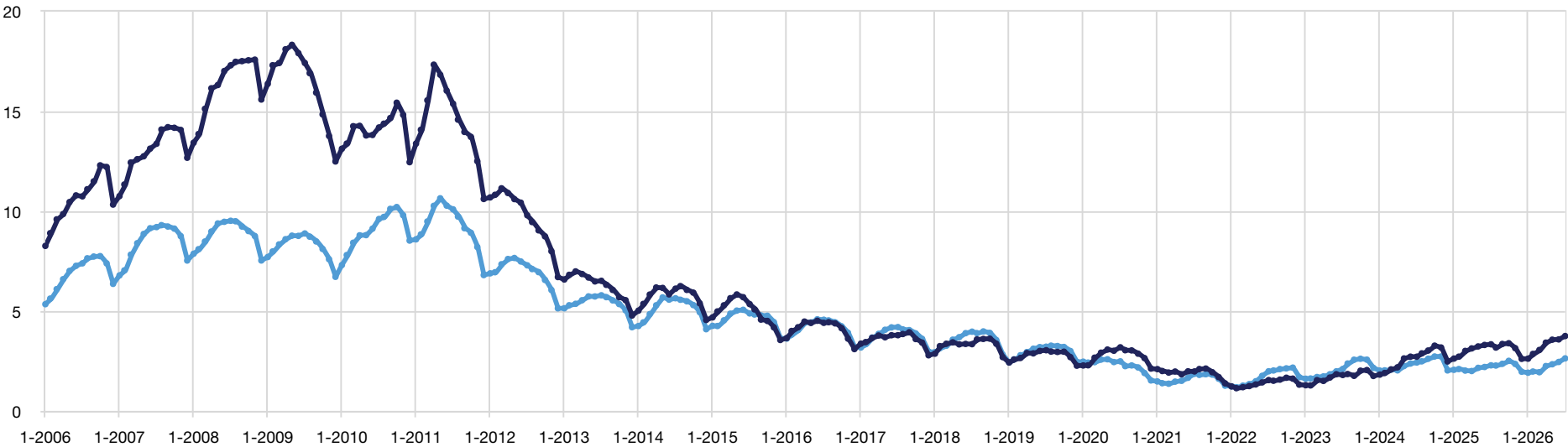
July



Months Supply	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Aug-2025	2.3	- 8.0%	3.2	+ 10.3%
Sep-2025	2.4	- 7.7%	3.4	+ 13.3%
Oct-2025	2.5	- 7.4%	3.4	+ 3.0%
Nov-2025	2.4	- 11.1%	3.1	- 3.1%
Dec-2025	2.0	0.0%	2.6	+ 4.0%
Jan-2026	1.9	- 9.5%	2.6	0.0%
Feb-2026	2.0	- 4.8%	2.9	+ 7.4%
Mar-2026	1.9	- 5.0%	3.1	+ 3.3%
Apr-2026	2.2	+ 10.0%	3.4	+ 9.7%
May-2026	2.3	+ 4.5%	3.6	+ 12.5%
Jun-2026	2.5	+ 13.6%	3.6	+ 9.1%
Jul-2026	2.6	+ 13.0%	3.8	+ 15.2%
12-Month Avg*	2.2	- 1.6%	3.2	+ 6.5%

* Months Supply for all properties from August 2025 through July 2026. 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	7-2025	7-2026	% Change	YTD 2025	YTD 2026	% Change
New Listings		2,246	2,501	+ 11.4%	15,162	15,322	+ 1.1%
Pending Sales		1,719	1,675	- 2.6%	11,717	11,578	- 1.2%
Closed Sales		1,962	1,862	- 5.1%	10,844	10,867	+ 0.2%
Days on Market Until Sale		26	27	+ 3.8%	32	34	+ 6.3%
Median Sales Price		\$314,950	\$334,950	+ 6.4%	\$291,500	\$310,000	+ 6.3%
Average Sales Price		\$407,429	\$421,423	+ 3.4%	\$365,573	\$393,892	+ 7.7%
Percent of List Price Received		100.7%	100.9%	+ 0.2%	100.1%	100.2%	+ 0.1%
Housing Affordability Index		108	102	- 5.6%	116	110	- 5.2%
Inventory of Homes for Sale		3,887	4,420	+ 13.7%	—	—	—
Months Supply of Inventory		2.4	2.8	+ 16.7%	—	—	—