Monthly Indicators

August 2026

U.S. existing-home sales edged down 1.7% from the previous month to a seasonally adjusted annual rate of 4.06 million units, according to the National Association of REALTORS® (NAR). Regionally, sales increased in the Northeast, held steady in the West, and declined in the Midwest and South. On a year-over-year basis, sales rose in the Midwest and West while remaining flat in the Northeast and South.

New Listings decreased 1.0 percent for Residential homes but increased 12.1 percent for Townhouse/Condo homes. Pending Sales decreased 6.3 percent for Residential homes and 2.5 percent for Townhouse/Condo homes. Inventory increased 13.2 percent for Residential homes and 11.7 percent for Townhouse/Condo homes.

Median Sales Price increased 6.6 percent to $340,000 for Residential homes and 2.1 percent to $220,000 for Townhouse/Condo homes. Days on Market decreased 12.5 percent for Residential homes but increased 4.8 percent for Townhouse/Condo homes. Months Supply of Inventory increased 13.0 percent for Residential homes and 15.6 percent for Townhouse/Condo homes.

Nationally, the median existing-home sales price climbed to $431,400, as inventory remained at a 4.6-month supply at the current sales pace, NAR reported. Year-to-date sales are up 2.4%, reflecting stable demand even amid elevated mortgage rates. Homes are sitting on the market longer and fewer buyers are bidding above asking price compared to a year earlier, though local market conditions vary widely.

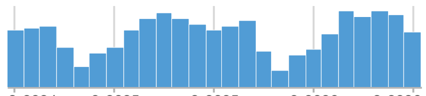
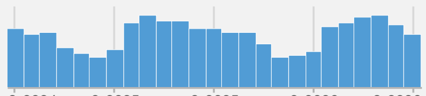
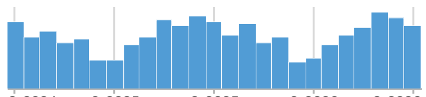
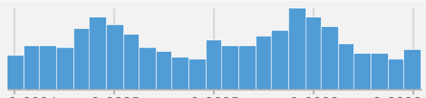
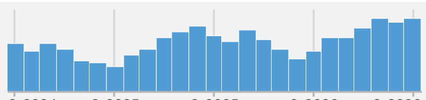
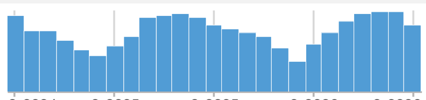
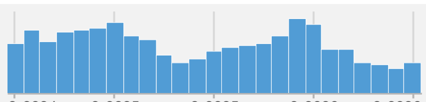
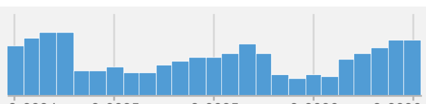
Quick Facts

- 6.2%	+ 8.7%	+ 12.4%
Change in **Closed Sales** All Properties	Change in **Median Sales Price** All Properties	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.

Residential Market Overview

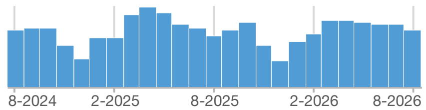
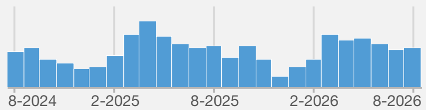
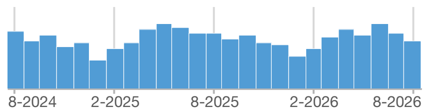
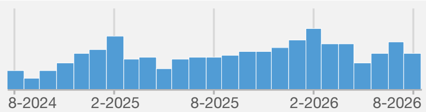
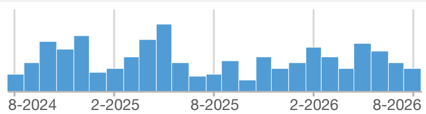
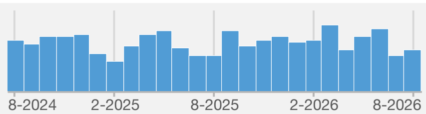
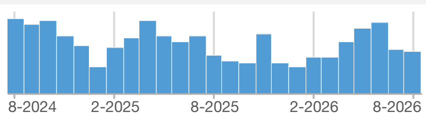
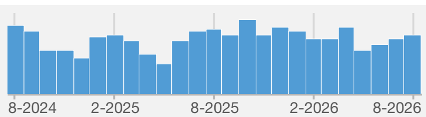
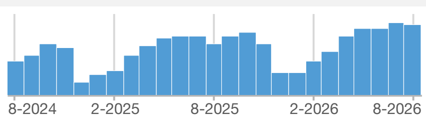
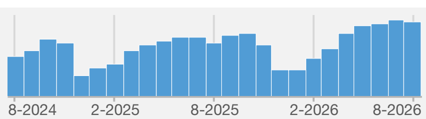
Key metrics by report month and for year-to-date (YTD) starting from the first of the year. Single Family properties only.

Key Metrics	Historical Sparkbars	8-2025	8-2026	% Change	YTD 2025	YTD 2026	% Change
New Listings		1,771	**1,753**	- 1.0%	14,336	**14,640**	+ 2.1%
Pending Sales		1,451	**1,359**	- 6.3%	11,376	**11,314**	- 0.5%
Closed Sales		1,598	**1,515**	- 5.2%	10,804	**10,789**	- 0.1%
Days on Market Until Sale		32	**28**	- 12.5%	30	**31**	+ 3.3%
Median Sales Price		$318,845	**$340,000**	+ 6.6%	$305,500	**$330,000**	+ 8.0%
Average Sales Price		$405,687	**$452,626**	+ 11.6%	$384,632	**$417,855**	+ 8.6%
Percent of List Price Received		100.5%	**100.5%**	0.0%	100.5%	**100.5%**	0.0%
Housing Affordability Index		108	**100**	- 7.4%	113	**103**	- 8.8%
Inventory of Homes for Sale		3,074	**3,481**	+ 13.2%	—	**—**	—
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.

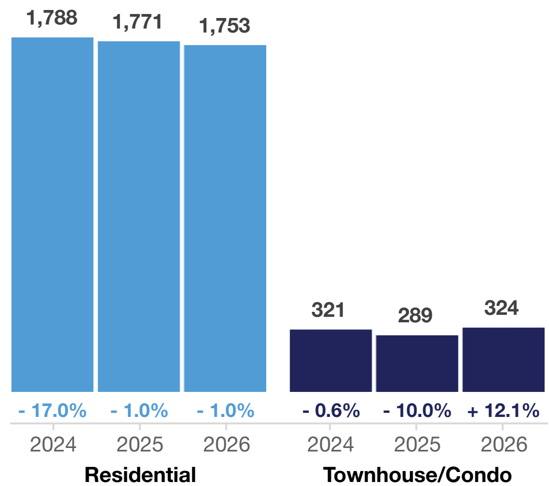
St. Louis REALTORS®

Key Metrics	Historical Sparkbars	8-2025	8-2026	% Change	YTD 2025	YTD 2026	% Change
New Listings		289	**324**	+ 12.1%	2,790	**2,680**	- 3.9%
Pending Sales		243	**237**	- 2.5%	1,971	**1,884**	- 4.4%
Closed Sales		246	**217**	- 11.8%	1,830	**1,804**	- 1.4%
Days on Market Until Sale		42	**44**	+ 4.8%	42	**49**	+ 16.7%
Median Sales Price		$215,500	**$220,000**	+ 2.1%	$230,000	**$230,000**	0.0%
Average Sales Price		$265,250	**$276,119**	+ 4.1%	$280,204	**$290,985**	+ 3.8%
Percent of List Price Received		97.7%	**97.9%**	+ 0.2%	98.3%	**98.2%**	- 0.1%
Housing Affordability Index		158	**153**	- 3.2%	148	**146**	- 1.4%
Inventory of Homes for Sale		728	**813**	+ 11.7%	—	**—**	—
Months Supply of Inventory		3.2	**3.7**	+ 15.6%	—	**—**	—

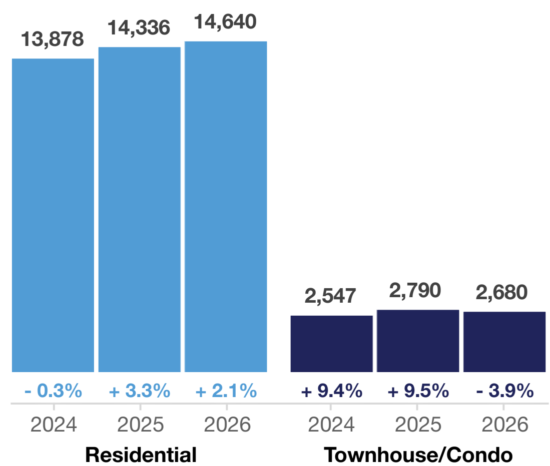
New Listings

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

August

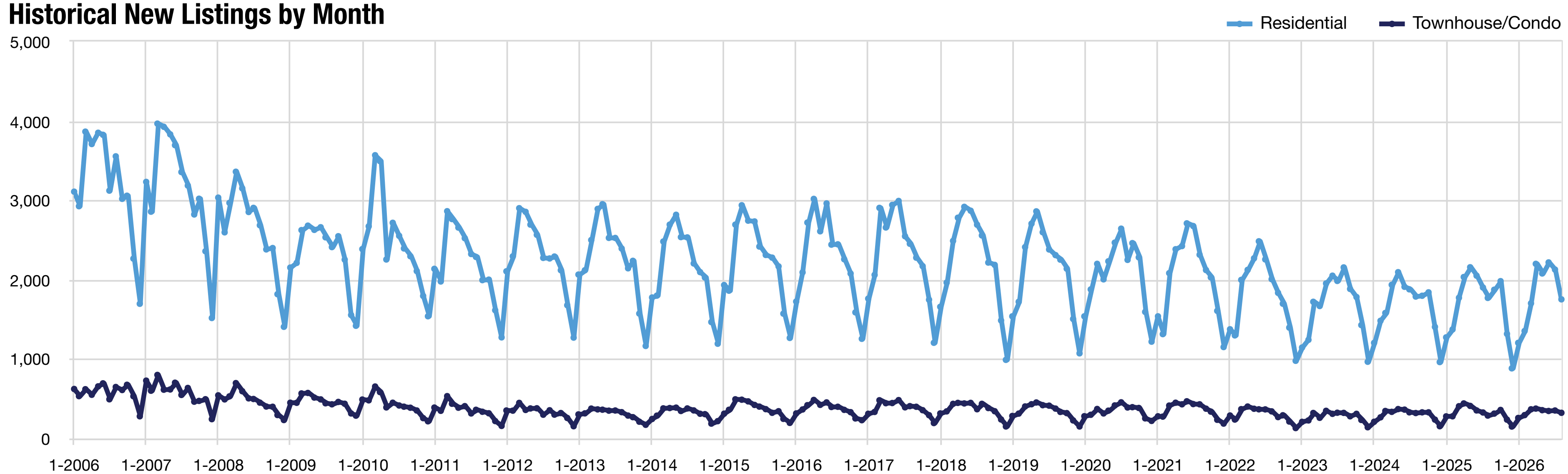


Year to Date



New Listings	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
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	2,218	+ 8.1%	347	- 2.0%
Jul-2026	2,128	+ 11.9%	353	+ 7.6%
Aug-2026	**1,753**	**- 1.0%**	**324**	**+ 12.1%**
12-Month Avg	1,725	+ 1.8%	312	- 2.5%

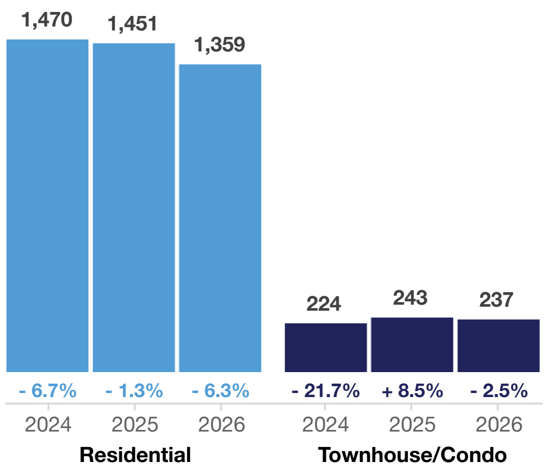
Historical New Listings by Month



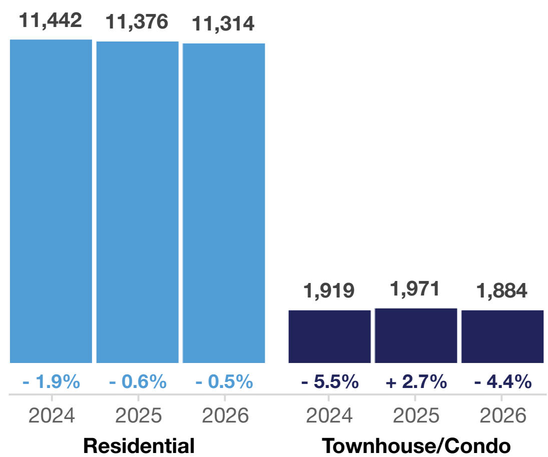
Pending Sales

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

August

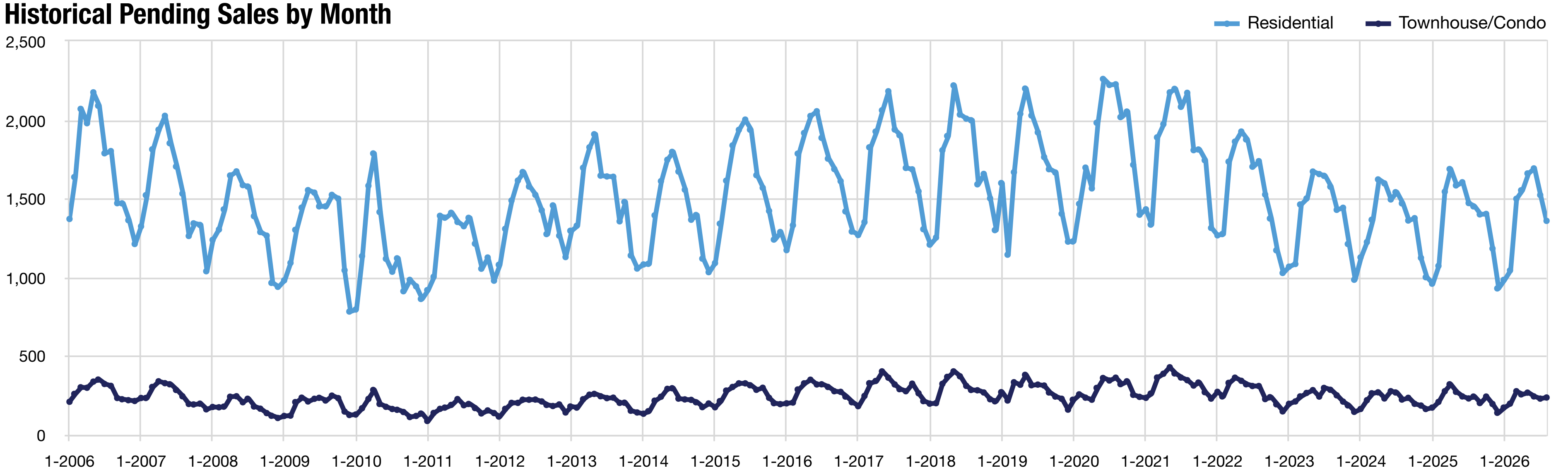


Year to Date



Pending Sales	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Sep-2025	1,400	+ 2.9%	202	- 14.0%
Oct-2025	1,403	+ 2.0%	243	+ 23.4%
Nov-2025	1,183	+ 5.2%	196	+ 5.4%
Dec-2025	930	- 7.1%	140	- 14.6%
Jan-2026	984	+ 2.5%	173	0.0%
Feb-2026	1,044	- 2.7%	198	- 5.3%
Mar-2026	1,499	- 2.9%	277	0.0%
Apr-2026	1,553	- 8.0%	257	- 19.9%
May-2026	1,660	+ 4.8%	268	- 1.8%
Jun-2026	1,692	+ 5.5%	244	0.0%
Jul-2026	1,523	+ 3.5%	230	- 0.4%
Aug-2026	**1,359**	**- 6.3%**	**237**	**- 2.5%**
12-Month Avg	1,353	0.0%	222	- 3.1%

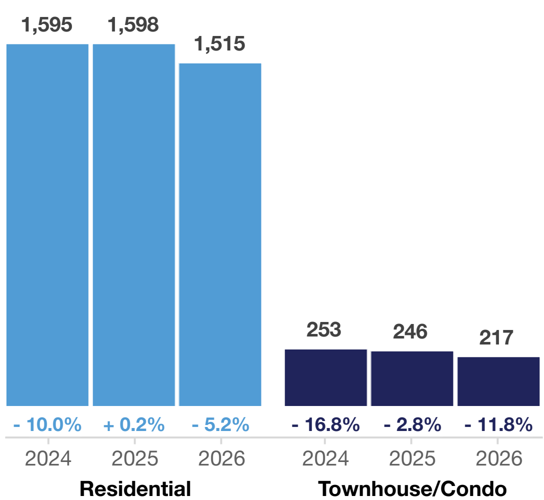
Historical Pending Sales by Month



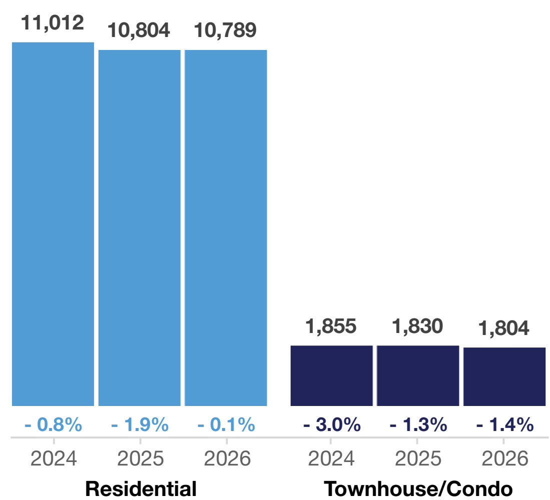
Closed Sales

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

August

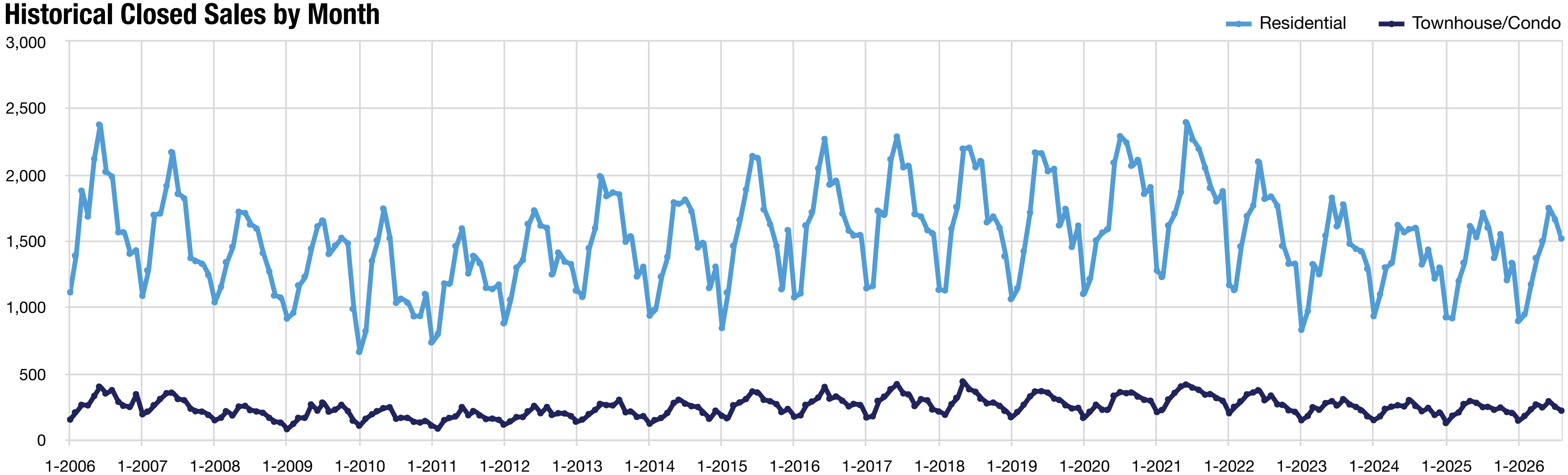


Year to Date



Closed Sales	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
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	1,169	- 2.2%	227	+ 11.3%
Apr-2026	1,368	+ 2.7%	264	- 1.1%
May-2026	1,495	- 7.1%	242	- 16.6%
Jun-2026	1,746	+ 14.4%	288	+ 4.3%
Jul-2026	1,659	- 2.9%	247	+ 1.2%
Aug-2026	**1,515**	**- 5.2%**	**217**	**- 11.8%**
12-Month Avg	1,353	+ 1.0%	223	+ 0.5%

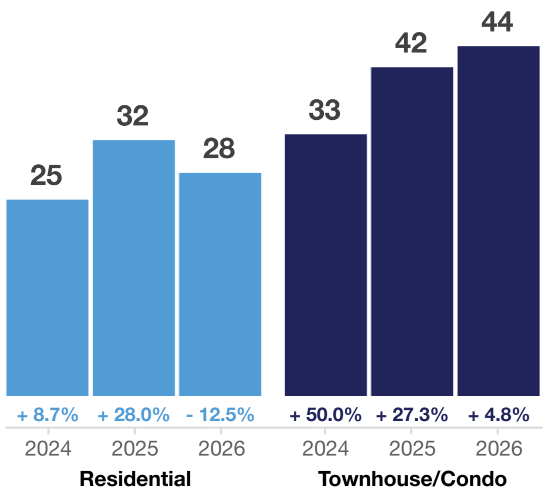
Historical Closed Sales by Month



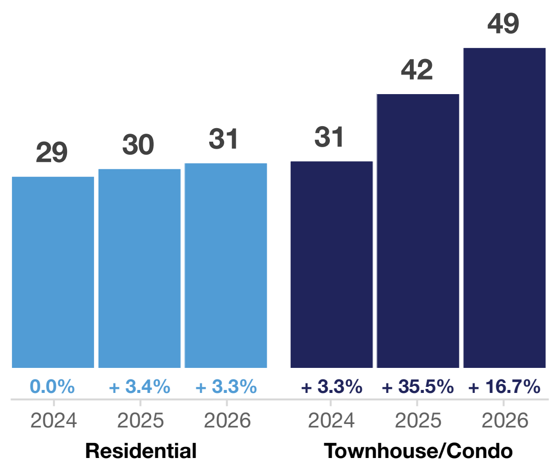
Days on Market Until Sale

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

August



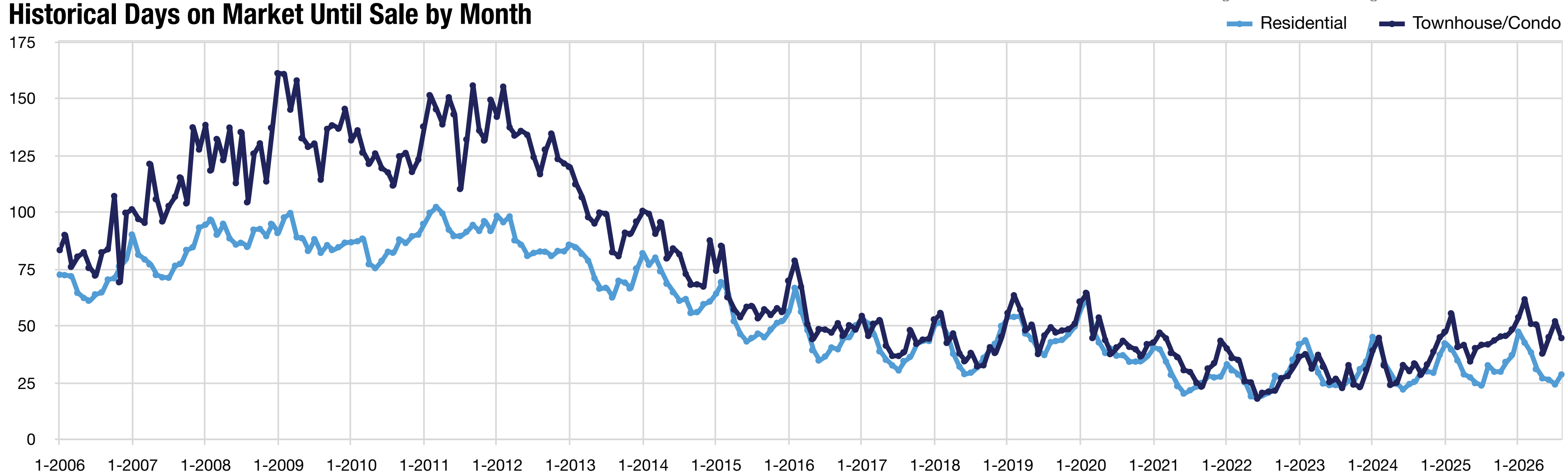
Year to Date



Days on Market	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
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	27	0.0%	37	+ 8.8%
Jun-2026	26	+ 8.3%	45	+ 12.5%
Jul-2026	24	+ 4.3%	52	+ 26.8%
Aug-2026	**28**	**- 12.5%**	**44**	**+ 4.8%**
12-Month Avg*	31	+ 3.1%	47	+ 19.6%

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

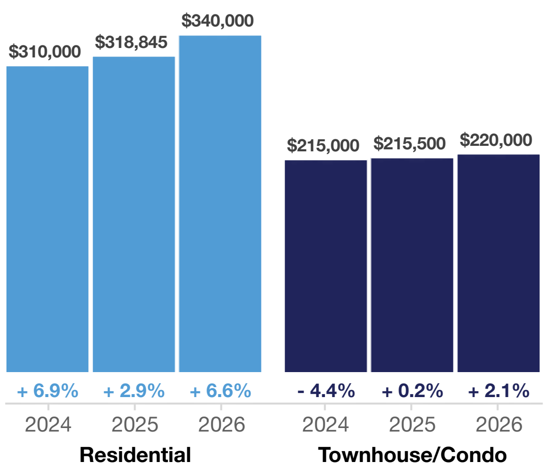
Historical Days on Market Until Sale by Month



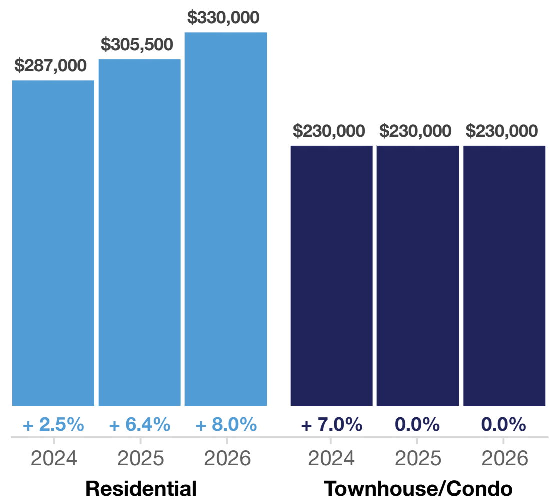
Median Sales Price

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

August



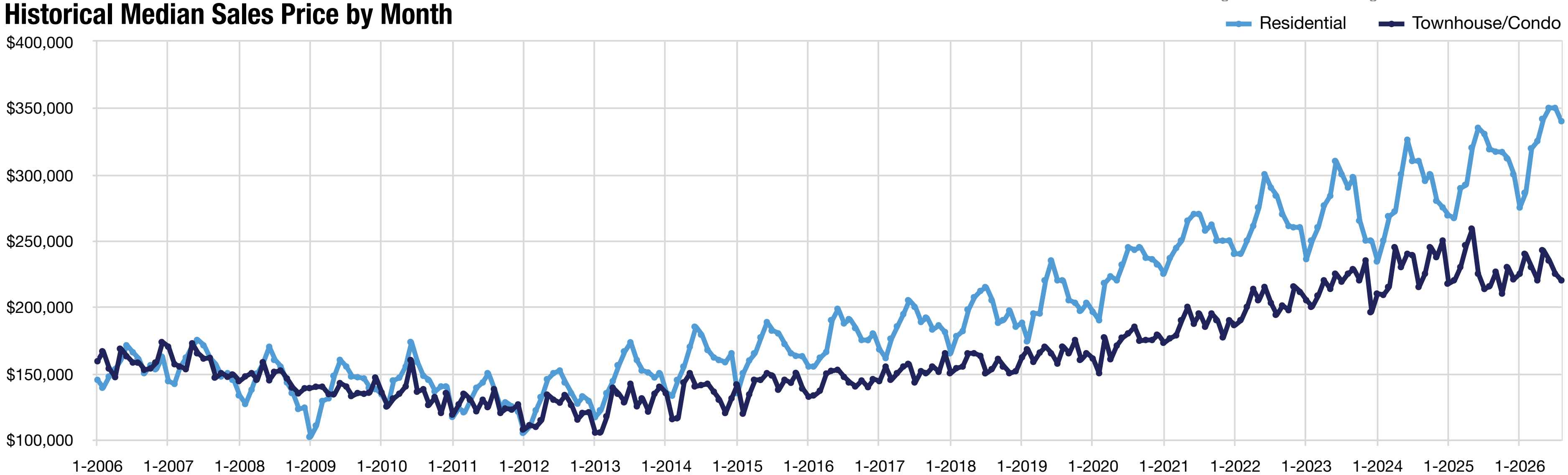
Year to Date



Median Sales Price	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
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	$319,500	+ 10.4%	$230,000	0.0%
Apr-2026	$325,000	+ 11.3%	$220,000	- 10.8%
May-2026	$341,751	+ 6.8%	$242,750	- 6.3%
Jun-2026	$350,000	+ 4.5%	$234,950	+ 4.4%
Jul-2026	$350,000	+ 5.9%	$225,000	+ 5.4%
Aug-2026	**$340,000**	**+ 6.6%**	**$220,000**	**+ 2.1%**
12-Month Avg*	$325,000	+ 8.3%	$227,000	- 1.3%

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

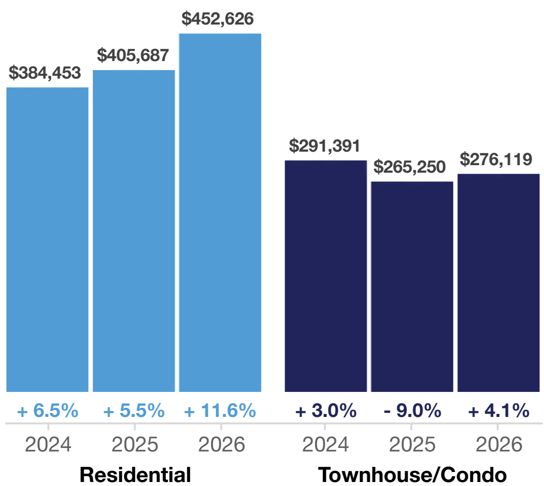
Historical Median Sales Price by Month



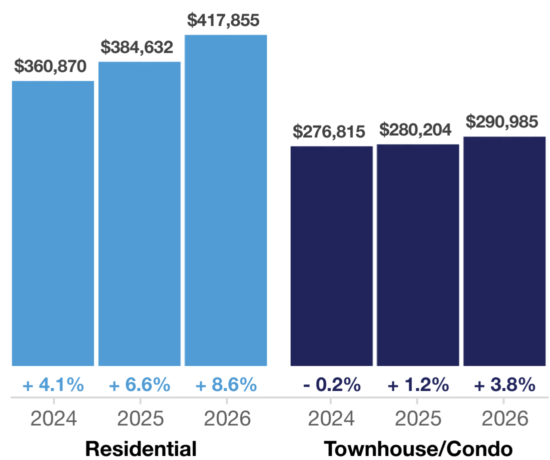
Average Sales Price

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

August



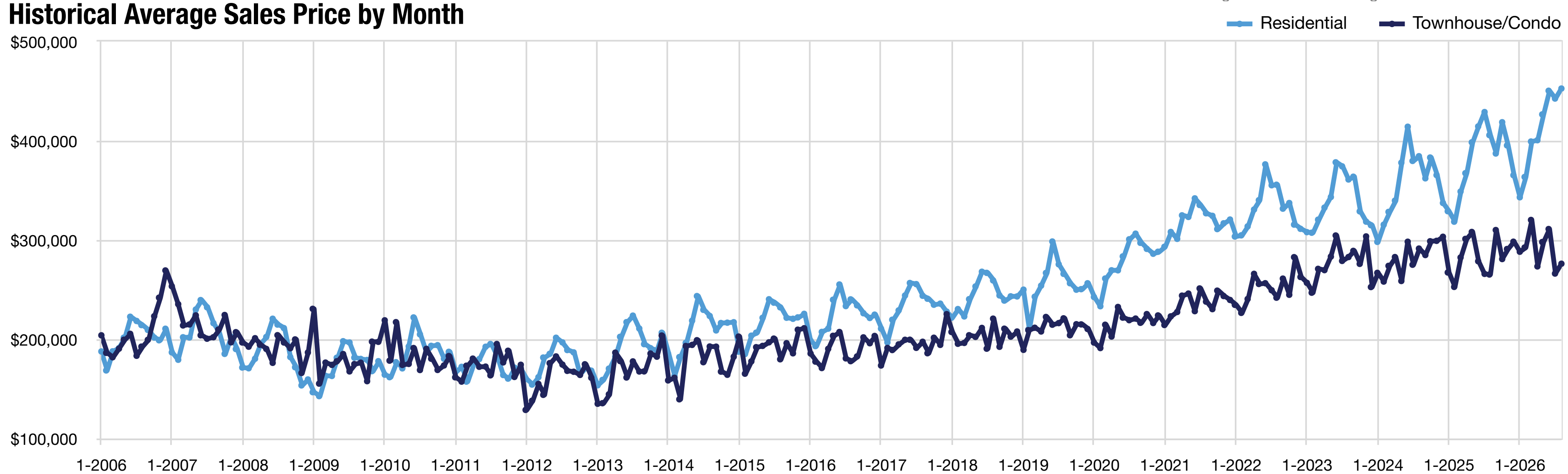
Year to Date



Avg. Sales Price	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
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	$399,249	+ 14.5%	$320,227	+ 13.4%
Apr-2026	$400,572	+ 9.0%	$273,426	- 9.2%
May-2026	$426,564	+ 7.1%	$297,982	- 3.3%
Jun-2026	$450,400	+ 8.7%	$311,062	+ 11.6%
Jul-2026	$442,541	+ 3.2%	$266,222	+ 0.1%
Aug-2026	**$452,626**	**+ 11.6%**	**$276,119**	**+ 4.1%**
12-Month Avg*	$409,379	+ 8.5%	$292,214	+ 2.4%

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

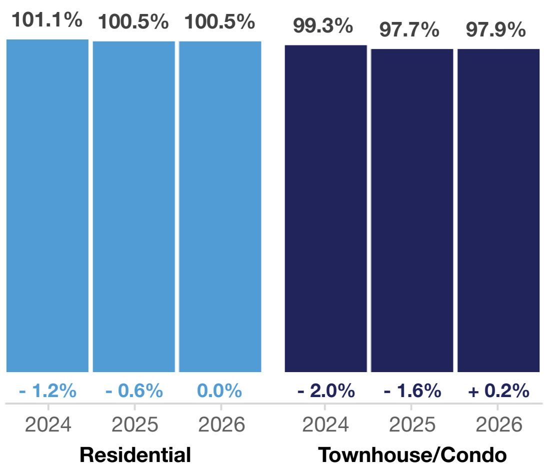
Historical Average Sales Price by Month



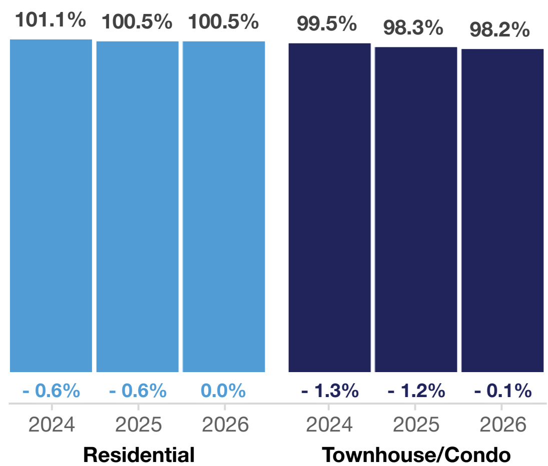
Percent of List Price Received

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.

August



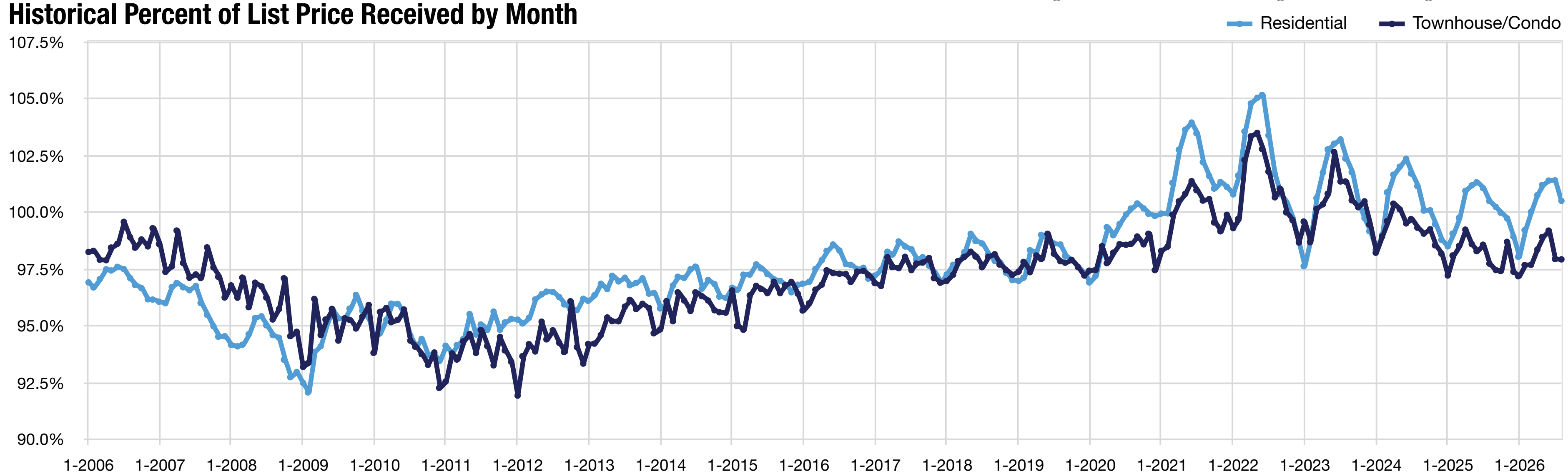
Year to Date



Pct. of List Price Received	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
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%
Aug-2026	**100.5%**	**0.0%**	**97.9%**	**+ 0.2%**
12-Month Avg*	100.2%	+ 0.1%	98.0%	- 0.5%

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

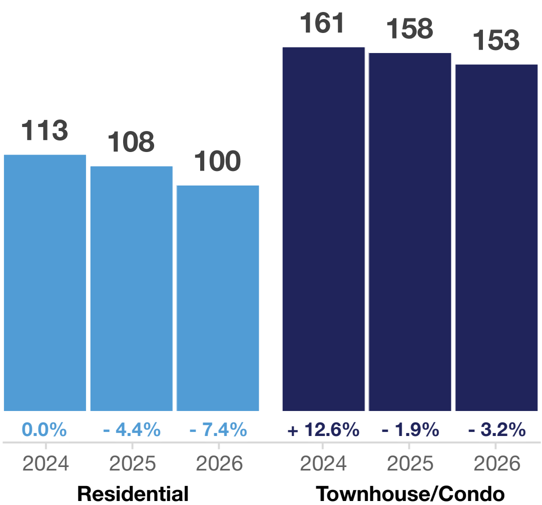
Historical Percent of List Price Received by Month



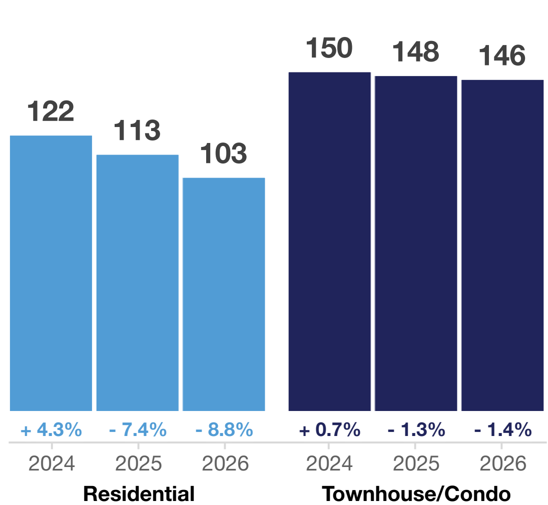
Housing Affordability Index

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.

August

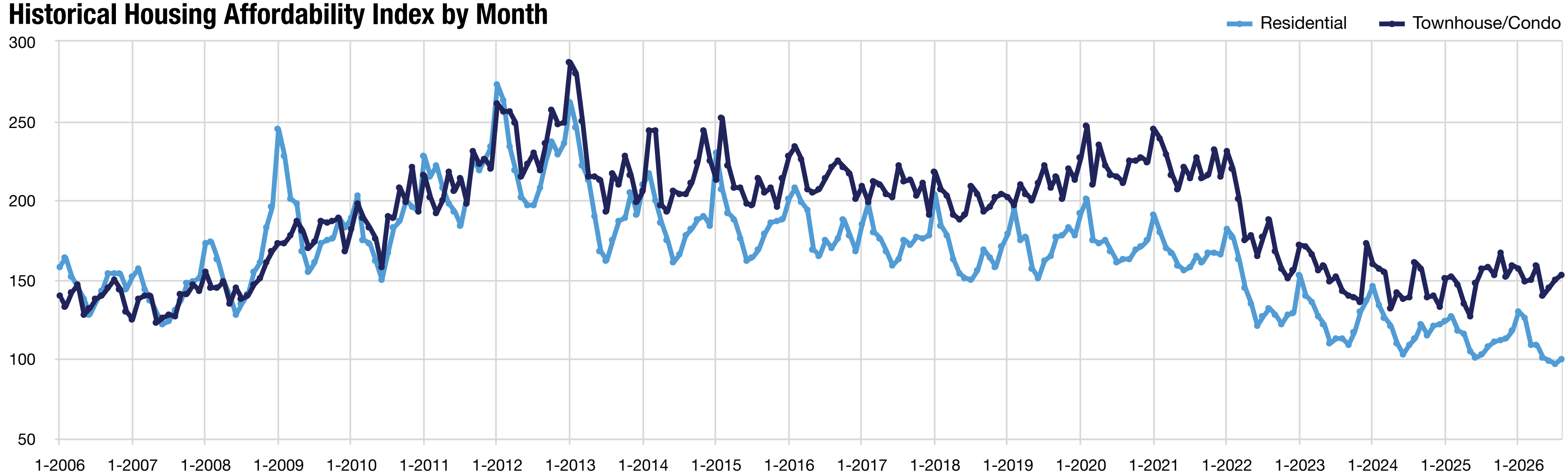


Year to Date



Affordability Index	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
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%	150	- 4.5%
Aug-2026	**100**	**- 7.4%**	**153**	**- 3.2%**
12-Month Avg	110	- 4.3%	153	+ 5.5%

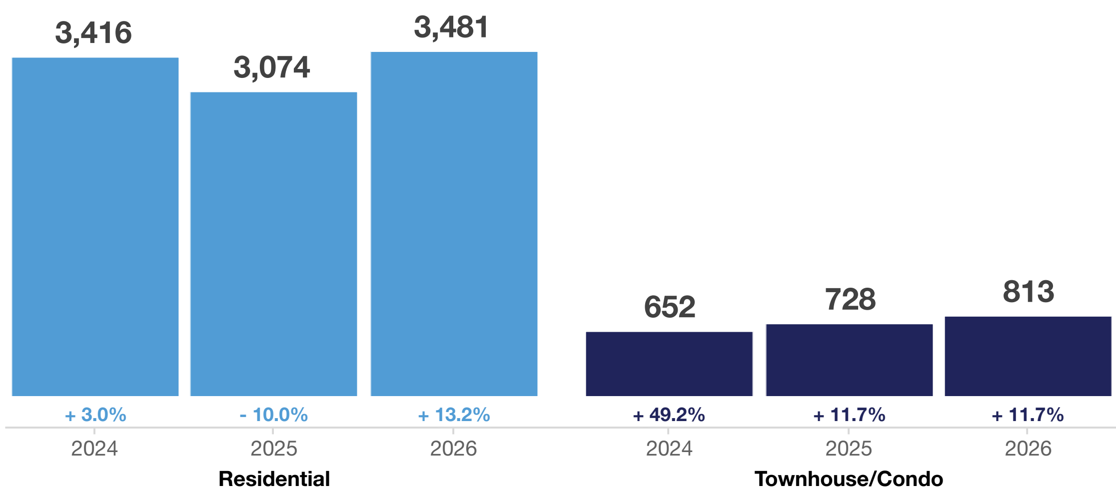
Historical Housing Affordability Index by Month



Inventory of Homes for Sale

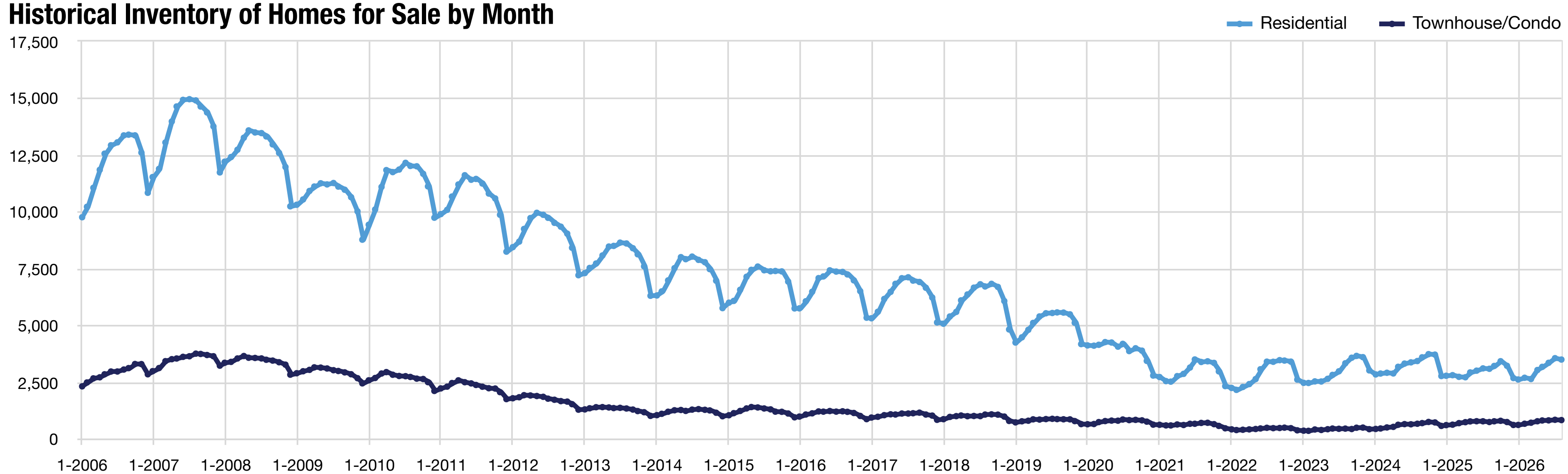
The number of properties available for sale in active status at the end of a given month.

August



Homes for Sale	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
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	2,603	- 5.9%	600	+ 1.4%
Feb-2026	2,679	- 4.1%	652	+ 6.7%
Mar-2026	2,623	- 3.5%	697	+ 2.7%
Apr-2026	3,020	+ 11.8%	762	+ 5.7%
May-2026	3,159	+ 8.4%	796	+ 5.4%
Jun-2026	3,338	+ 11.6%	801	+ 5.0%
Jul-2026	3,542	+ 14.6%	826	+ 8.7%
Aug-2026	**3,481**	**+ 13.2%**	**813**	**+ 11.7%**
12-Month Avg	3,077	+ 0.3%	734	+ 6.2%

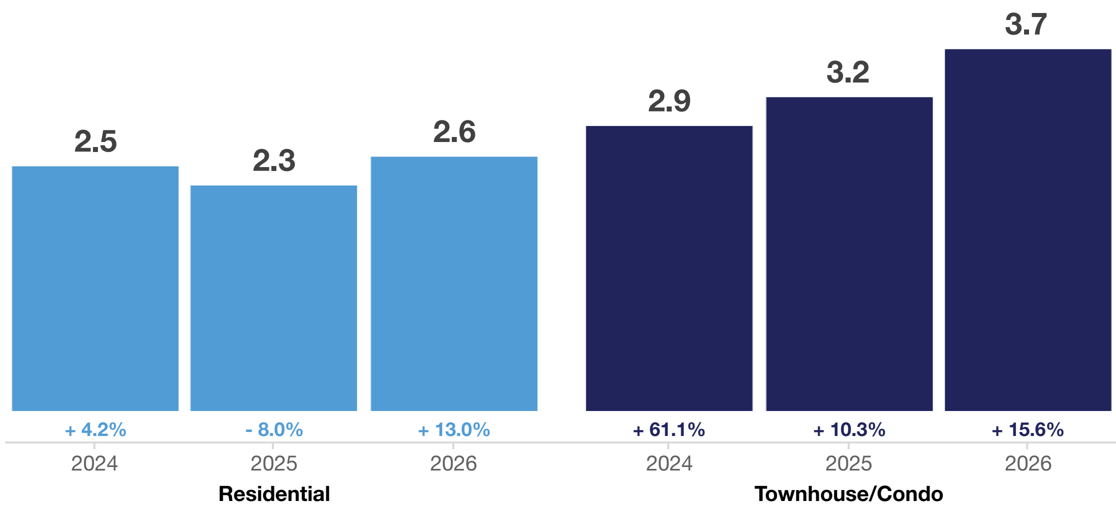
Historical Inventory of Homes for Sale by Month



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.

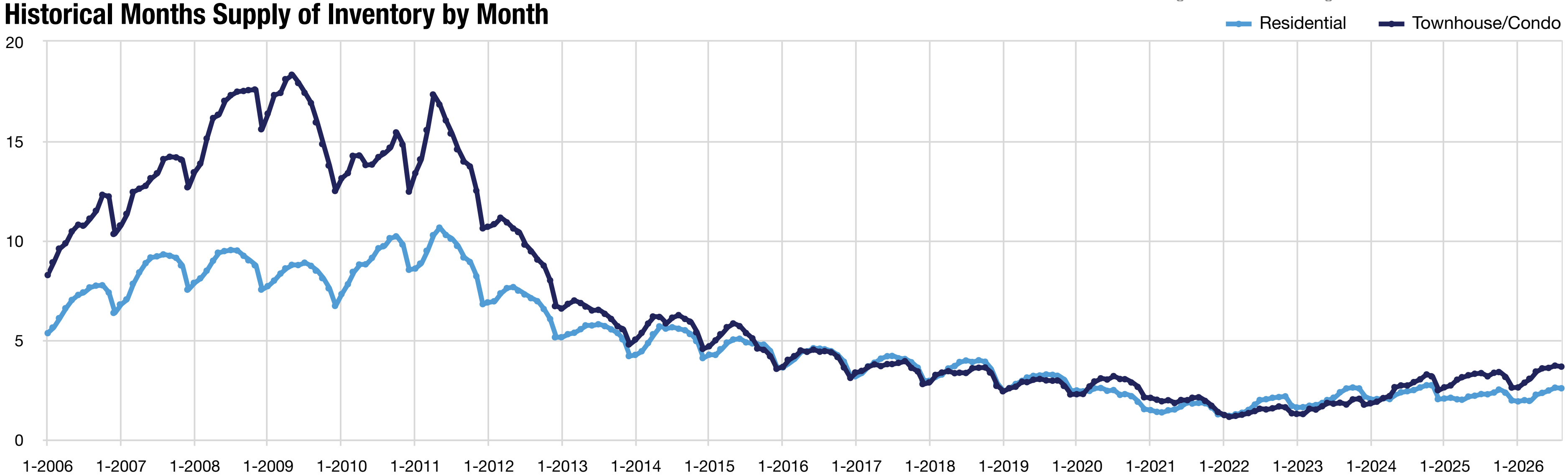
August



Months Supply	Residential	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
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%	3.7	+ 12.1%
Aug-2026	**2.6**	**+ 13.0%**	**3.7**	**+ 15.6%**
12-Month Avg*	2.3	+ 0.3%	3.2	+ 6.9%

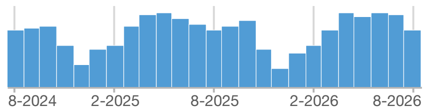
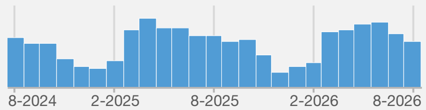
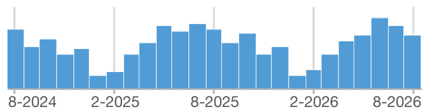
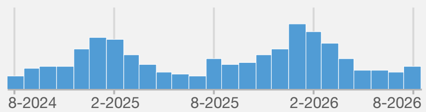
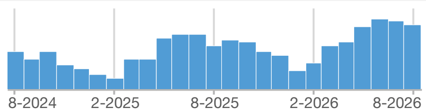
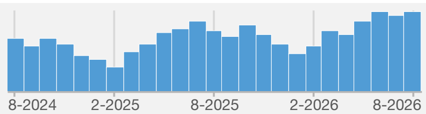
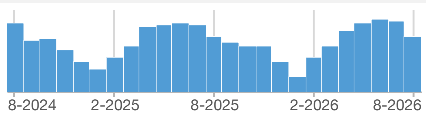
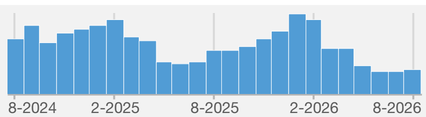
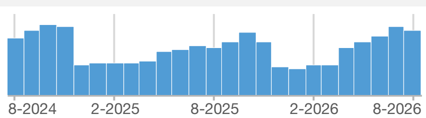
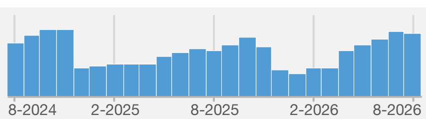
* Months Supply for all properties from September 2025 through August 2026. This is not the average of the individual figures above.

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	8-2025	8-2026	% Change	YTD 2025	YTD 2026	% Change
New Listings		2,076	**2,085**	+ 0.4%	17,238	**17,408**	+ 1.0%
Pending Sales		1,703	**1,606**	- 5.7%	13,420	**13,274**	- 1.1%
Closed Sales		1,860	**1,744**	- 6.2%	12,704	**12,666**	- 0.3%
Days on Market Until Sale		34	**30**	- 11.8%	32	**34**	+ 6.3%
Median Sales Price		$300,000	**$326,162**	+ 8.7%	$293,000	**$312,500**	+ 6.7%
Average Sales Price		$384,881	**$428,704**	+ 11.4%	$368,401	**$398,324**	+ 8.1%
Percent of List Price Received		100.1%	**100.1%**	0.0%	100.1%	**100.2%**	+ 0.1%
Housing Affordability Index		115	**104**	- 9.6%	117	**109**	- 6.8%
Inventory of Homes for Sale		3,840	**4,316**	+ 12.4%	—	**—**	—
Months Supply of Inventory		2.4	**2.7**	+ 12.5%	—	**—**	—