

Monthly Indicators



November 2025

U.S. sales of existing homes rose 1.2% from the previous month to a seasonally adjusted annual rate of 4.10 million, according to the National Association of REALTORS® (NAR), as buyers took advantage of lower mortgage rates this fall. Sales increased in the Midwest and South, held steady in the Northeast, and edged down in the West. Year-over-year, sales were up 1.7%, with gains in the Northeast, Midwest, and South, while the West posted a decline.

New Listings were up 4.2 percent to 1,649. Pending Sales increased 6.9 percent to 1,322. Inventory grew 11.5 percent to 5,099 units.

Median Sales Price was up 0.7 percent to \$422,295. Days on Market increased 8.3 percent to 52 days. Months Supply of Inventory was up 9.7 percent to 3.4 months.

Nationally, inventory dipped 0.7% month-over-month but rose 10.9% year-over-year, totaling 1.52 million units, according to NAR. At the current sales pace, supply stands at 4.4 months, slightly below last month's level but higher than the 4.1 months recorded a year ago. Supported by modest inventory levels, prices continue to rise, with the national median existing-home price increasing 2.1% year-over-year to \$415,200, marking 28 consecutive months of annual gains.

Quick Facts

- 8.1%	+ 0.7%	+ 9.7%
One-Year Change in Closed Sales	One-Year Change in Median Sales Price	One-Year Change in Months Supply

A research tool provided by the Charleston Trident Association of REALTORS®. Percent changes are calculated using rounded figures.

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Market Overview

Key market metrics for the current month and year-to-date figures.



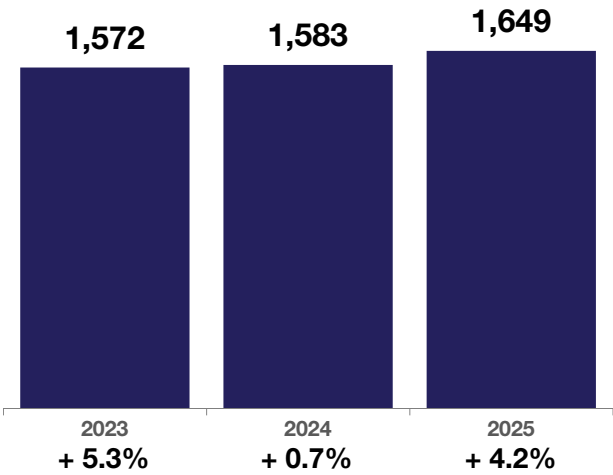
Key Metrics	Historical Sparkbars	11-2024	11-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
New Listings		1,583	1,649	+ 4.2%	22,614	24,175	+ 6.9%
Pending Sales		1,237	1,322	+ 6.9%	16,539	16,854	+ 1.9%
Closed Sales		1,333	1,225	- 8.1%	16,077	16,245	+ 1.0%
Days on Market		48	52	+ 8.3%	40	49	+ 22.5%
Median Sales Price		\$419,314	\$422,295	+ 0.7%	\$417,500	\$425,400	+ 1.9%
Average Sales Price		\$611,878	\$666,859	+ 9.0%	\$628,501	\$649,676	+ 3.4%
Pct. of Orig. Price Received		96.1%	95.0%	- 1.1%	96.6%	96.1%	- 0.5%
Housing Affordability Index		74	77	+ 4.1%	74	76	+ 2.7%
Inventory of Homes for Sale		4,575	5,099	+ 11.5%	--	--	--
Months Supply of Inventory		3.1	3.4	+ 9.7%	--	--	--

New Listings

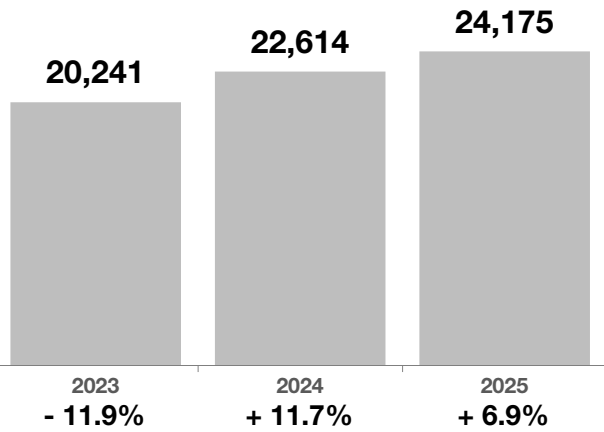
A count of the properties that have been newly listed on the market in a given month.



November

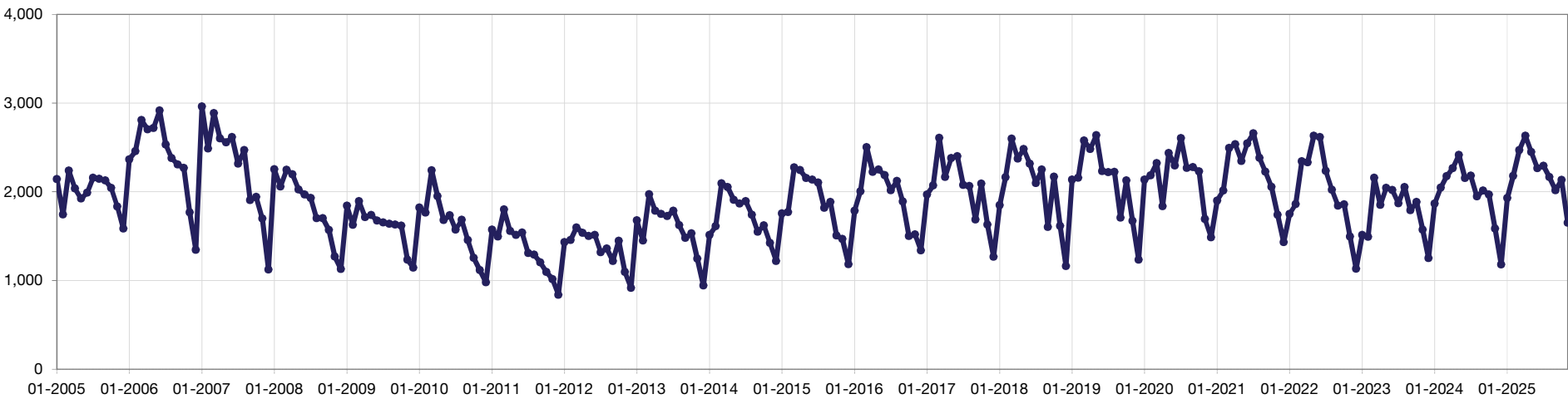


Year to Date



	New Listings	Prior Year	Percent Change
December 2024	1,179	1,251	-5.8%
January 2025	1,928	1,865	+3.4%
February 2025	2,177	2,047	+6.4%
March 2025	2,469	2,176	+13.5%
April 2025	2,630	2,266	+16.1%
May 2025	2,449	2,414	+1.4%
June 2025	2,265	2,153	+5.2%
July 2025	2,292	2,181	+5.1%
August 2025	2,165	1,948	+11.1%
September 2025	2,017	2,014	+0.1%
October 2025	2,134	1,967	+8.5%
November 2025	1,649	1,583	+4.2%
12-Month Avg	2,113	1,989	+6.2%

Historical New Listings by Month

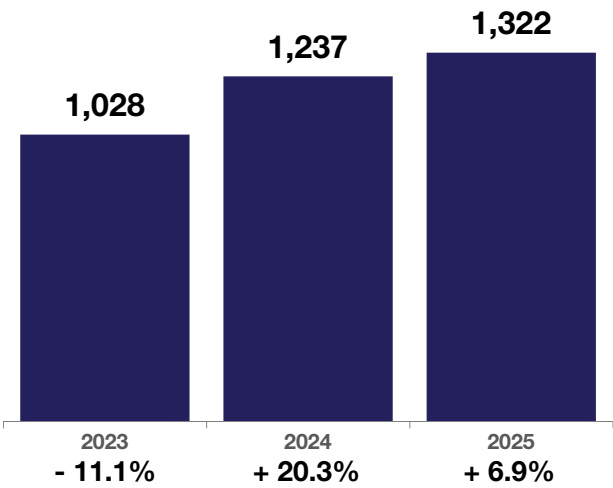


Pending Sales

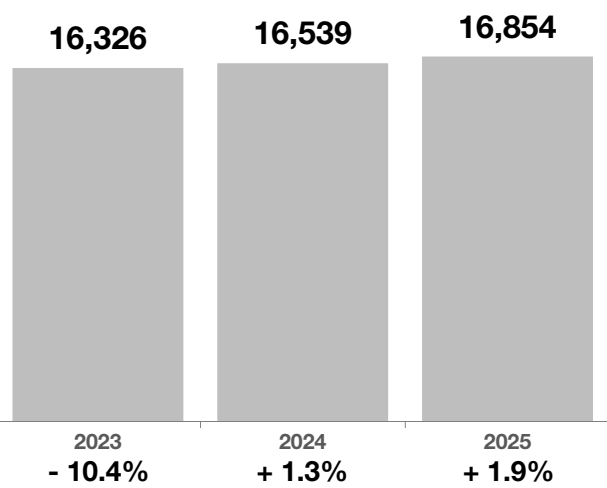
A count of the properties on which offers have been accepted in a given month.



November

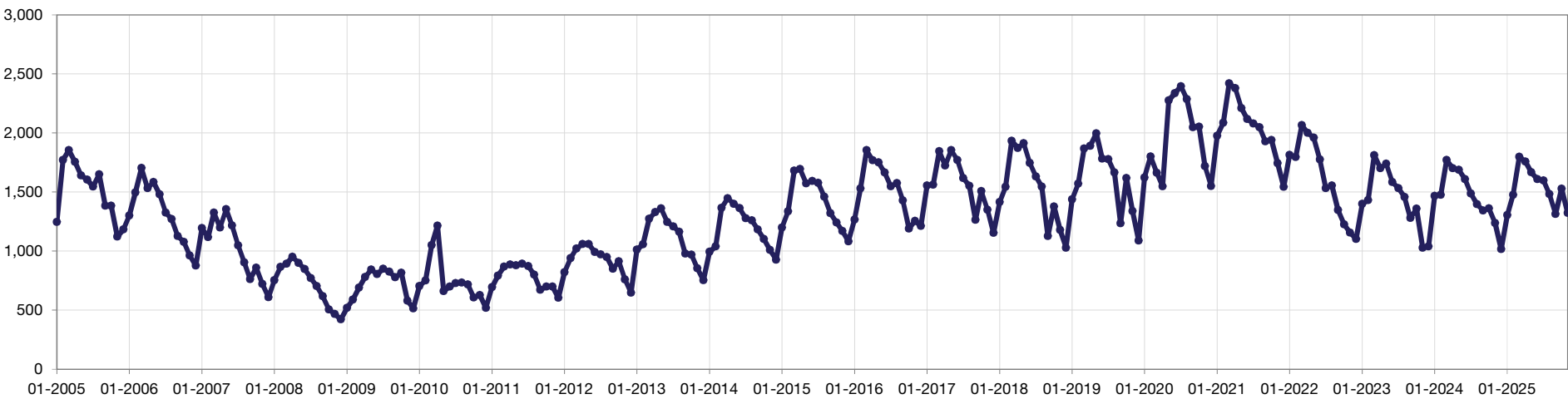


Year to Date



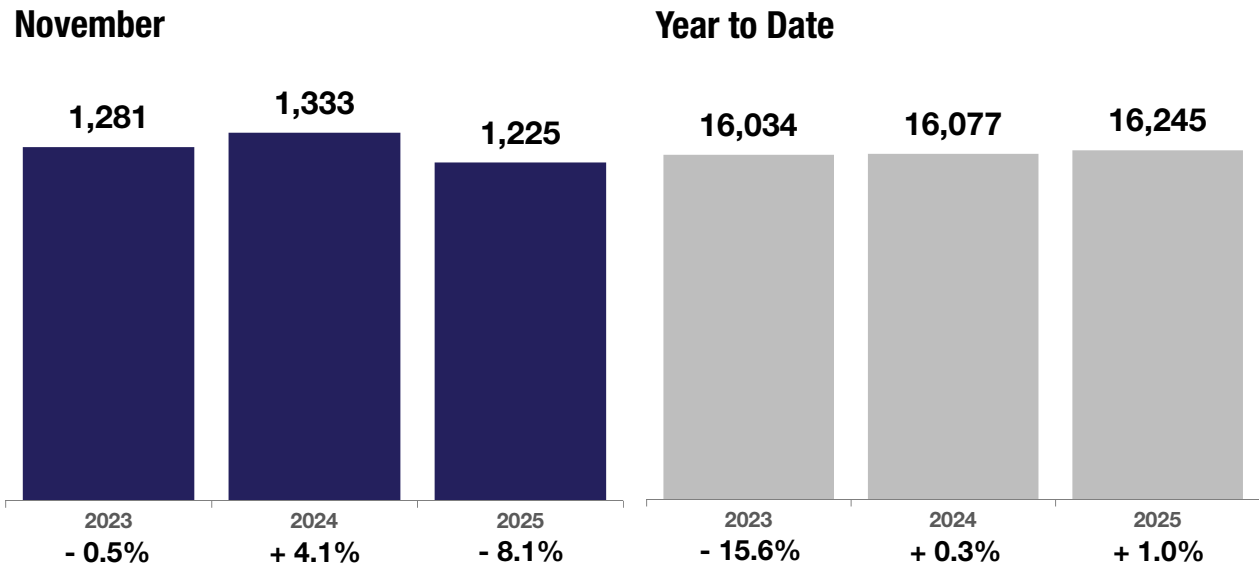
Pending Sales		Prior Year	Percent Change
December 2024	1,016	1,040	-2.3%
January 2025	1,304	1,468	-11.2%
February 2025	1,477	1,475	+0.1%
March 2025	1,797	1,771	+1.5%
April 2025	1,758	1,700	+3.4%
May 2025	1,667	1,688	-1.2%
June 2025	1,608	1,609	-0.1%
July 2025	1,598	1,488	+7.4%
August 2025	1,483	1,398	+6.1%
September 2025	1,313	1,343	-2.2%
October 2025	1,527	1,362	+12.1%
November 2025	1,322	1,237	+6.9%
12-Month Avg	1,489	1,465	+1.7%

Historical Pending Sales by Month



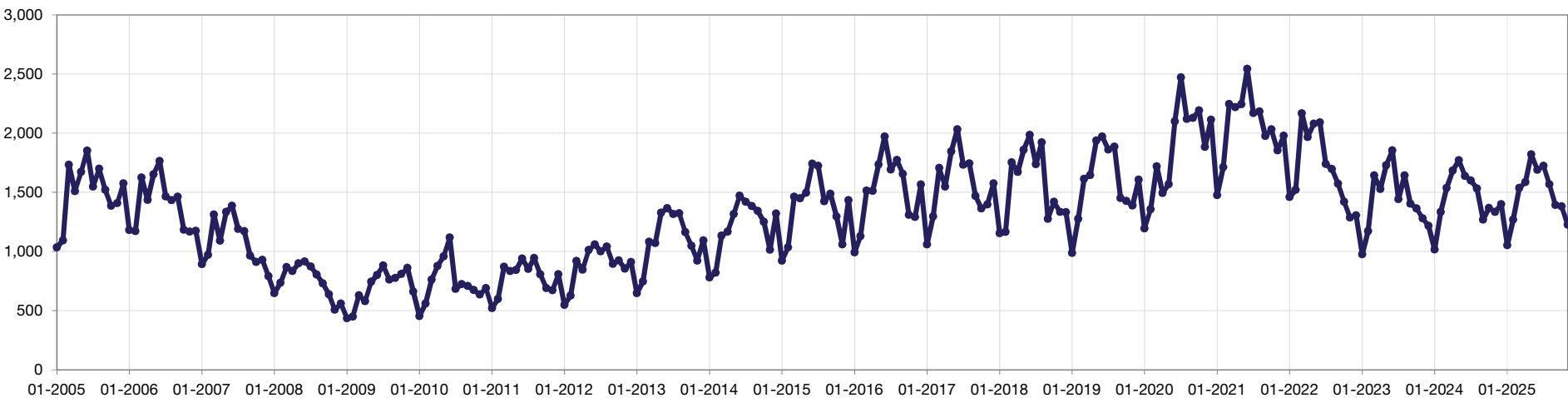
Closed Sales

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



Closed Sales		Prior Year	Percent Change
December 2024	1,399	1,216	+15.0%
January 2025	1,052	1,016	+3.5%
February 2025	1,269	1,334	-4.9%
March 2025	1,536	1,537	-0.1%
April 2025	1,586	1,682	-5.7%
May 2025	1,821	1,770	+2.9%
June 2025	1,689	1,637	+3.2%
July 2025	1,724	1,600	+7.7%
August 2025	1,568	1,533	+2.3%
September 2025	1,393	1,268	+9.9%
October 2025	1,382	1,367	+1.1%
November 2025	1,225	1,333	-8.1%
12-Month Avg	1,470	1,441	+2.0%

Historical Closed Sales by Month

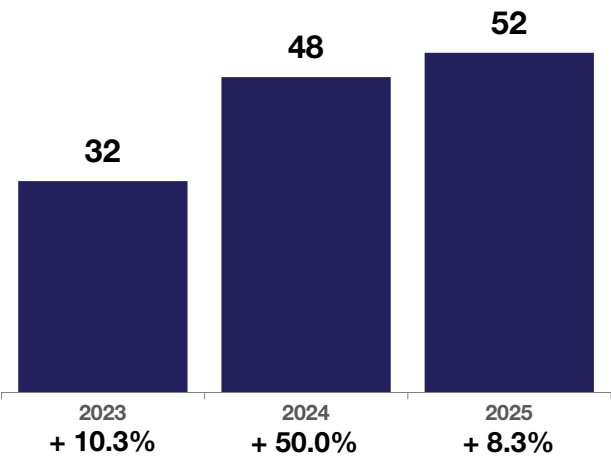


Days on Market Until Sale

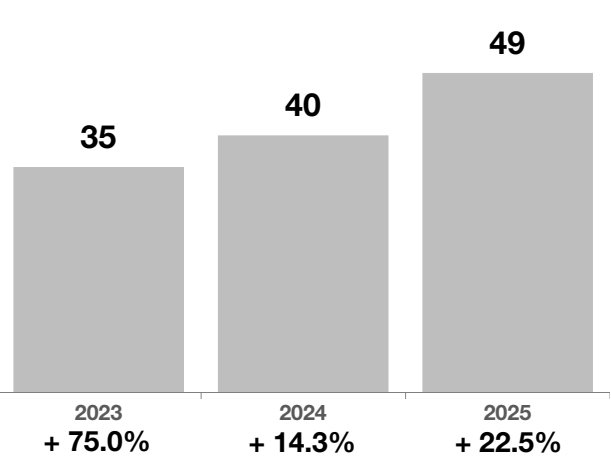
Average number of days between when a property is listed and when an offer is accepted in a given month.



November



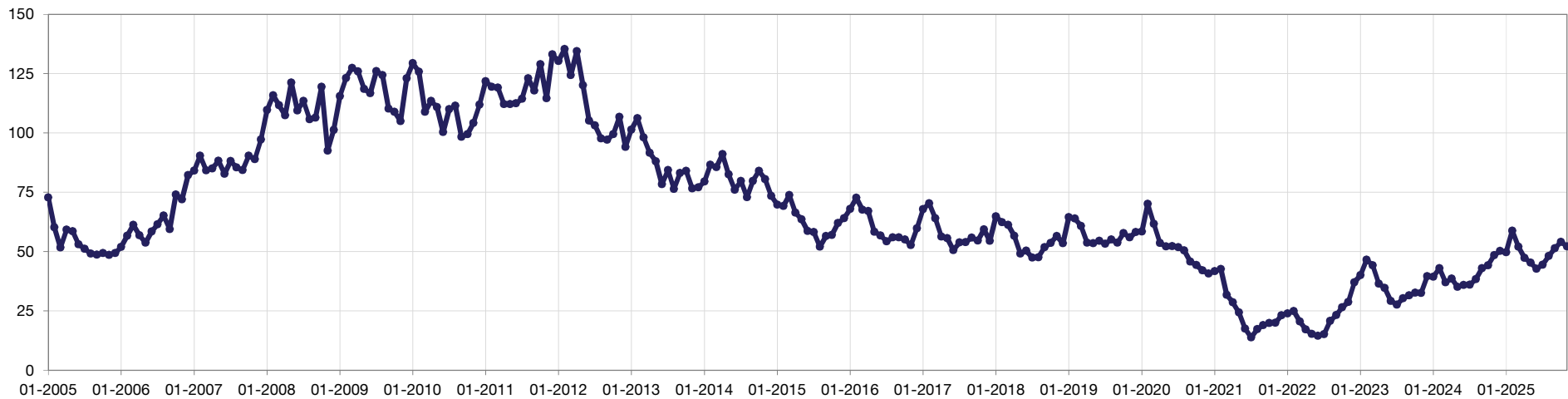
Year to Date



Days on Market		Prior Year	Percent Change
December 2024	50	40	+25.0%
January 2025	50	39	+28.2%
February 2025	59	43	+37.2%
March 2025	52	37	+40.5%
April 2025	47	39	+20.5%
May 2025	45	35	+28.6%
June 2025	43	36	+19.4%
July 2025	44	36	+22.2%
August 2025	48	38	+26.3%
September 2025	51	43	+18.6%
October 2025	54	44	+22.7%
November 2025	52	48	+8.3%
12-Month Avg*	49	40	+22.5%

* Average Days on Market of all properties from December 2024 through November 2025. This is not the average of the individual figures above.

Historical Days on Market Until Sale by Month

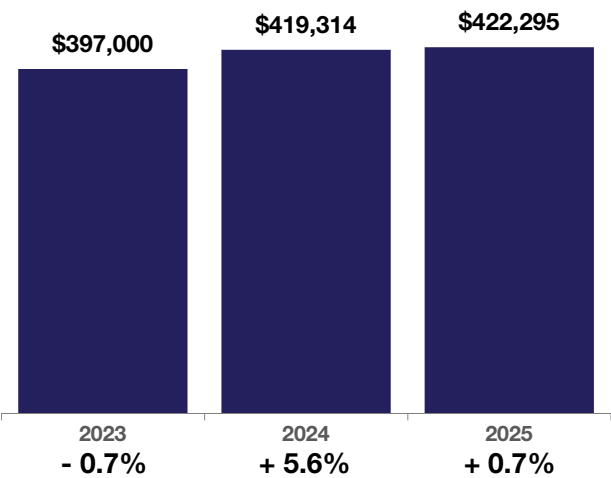


Median Sales Price

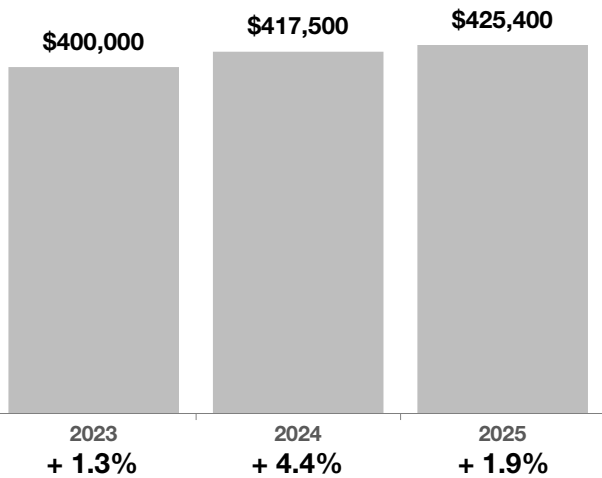
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



November



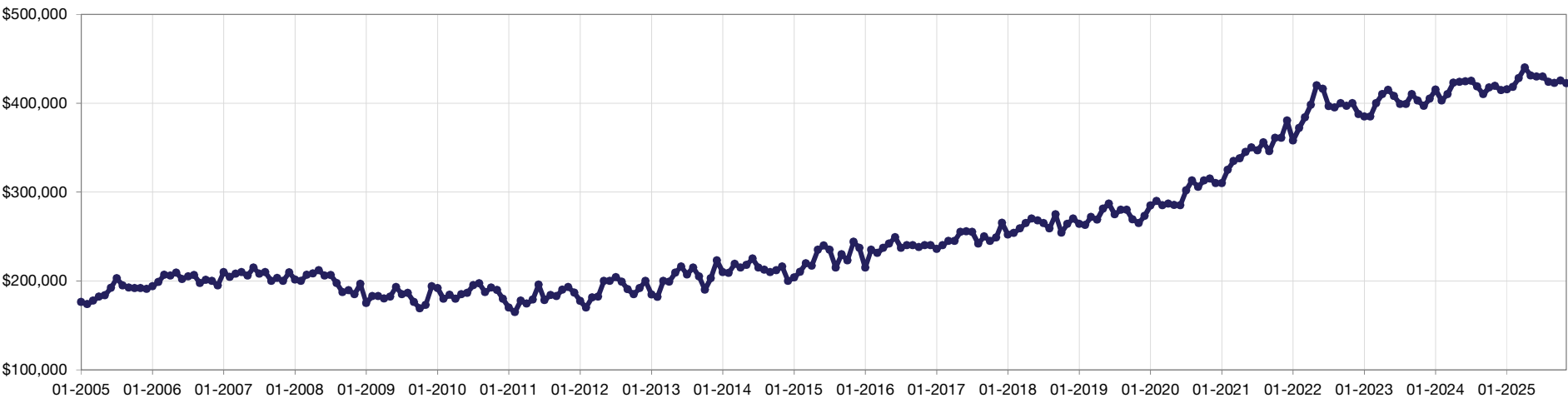
Year to Date



	Median Sales Price	Prior Year	Percent Change
December 2024	\$414,556	\$405,000	+2.4%
January 2025	\$415,459	\$415,155	+0.1%
February 2025	\$418,325	\$403,046	+3.8%
March 2025	\$428,000	\$410,000	+4.4%
April 2025	\$440,000	\$422,927	+4.0%
May 2025	\$431,000	\$424,000	+1.7%
June 2025	\$430,000	\$424,400	+1.3%
July 2025	\$430,000	\$425,000	+1.2%
August 2025	\$423,995	\$418,920	+1.2%
September 2025	\$422,718	\$410,000	+3.1%
October 2025	\$425,325	\$417,465	+1.9%
November 2025	\$422,295	\$419,314	+0.7%
12-Month Med*	\$425,000	\$416,000	+2.2%

* Median Sales Price of all properties from December 2024 through November 2025. This is not the median of the individual figures above.

Historical Median Sales Price by Month

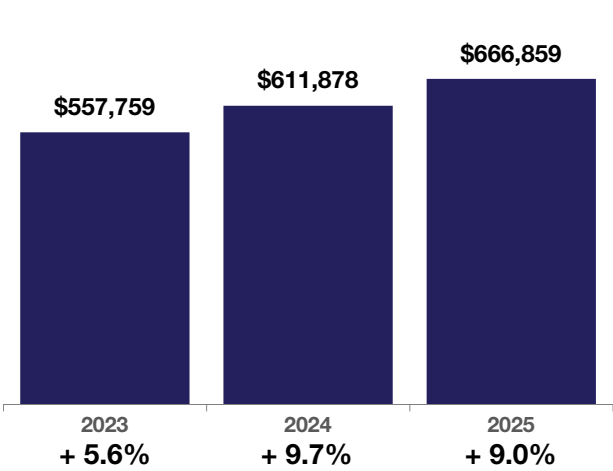


Average Sales Price

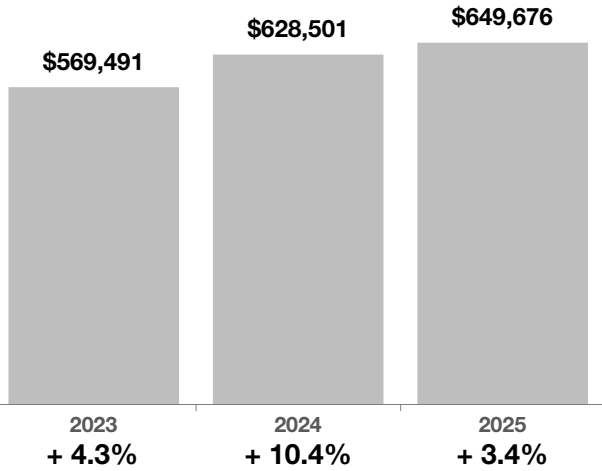
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



November



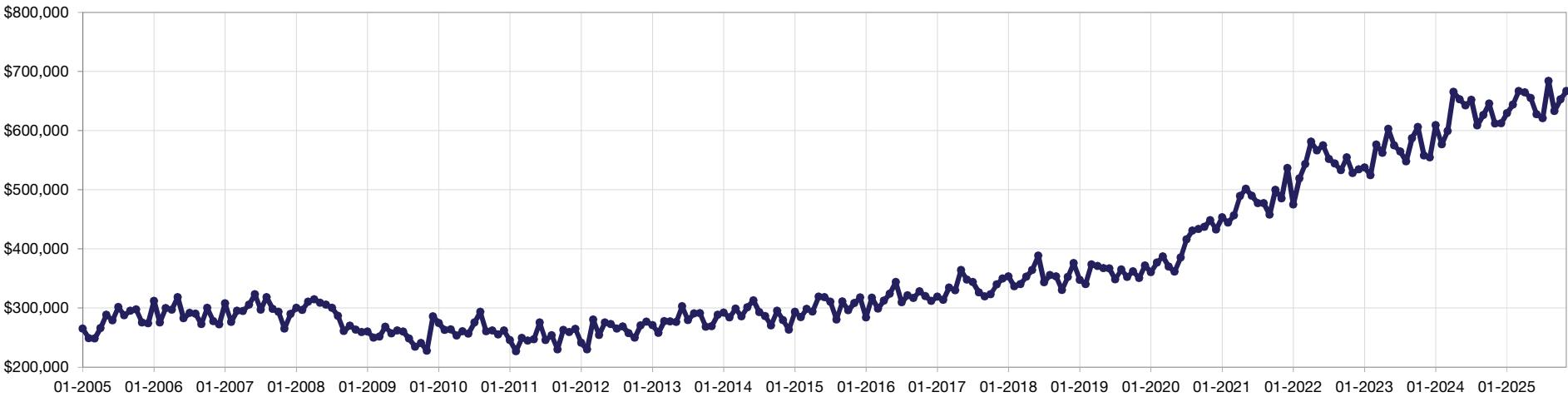
Year to Date



Avg. Sales Price	Prior Year	Percent Change
December 2024	\$612,226	\$554,639 +10.4%
January 2025	\$629,476	\$609,200 +3.3%
February 2025	\$643,852	\$576,662 +11.7%
March 2025	\$666,633	\$599,090 +11.3%
April 2025	\$664,703	\$665,461 -0.1%
May 2025	\$655,110	\$652,926 +0.3%
June 2025	\$627,697	\$642,555 -2.3%
July 2025	\$620,897	\$651,970 -4.8%
August 2025	\$683,659	\$608,651 +12.3%
September 2025	\$633,119	\$626,103 +1.1%
October 2025	\$652,858	\$645,800 +1.1%
November 2025	\$666,859	\$611,878 +9.0%
12-Month Avg*	\$646,424	\$620,411 +4.2%

* Avg. Sales Price of all properties from December 2024 through November 2025. This is not the average of the individual figures above.

Historical Average Sales Price by Month

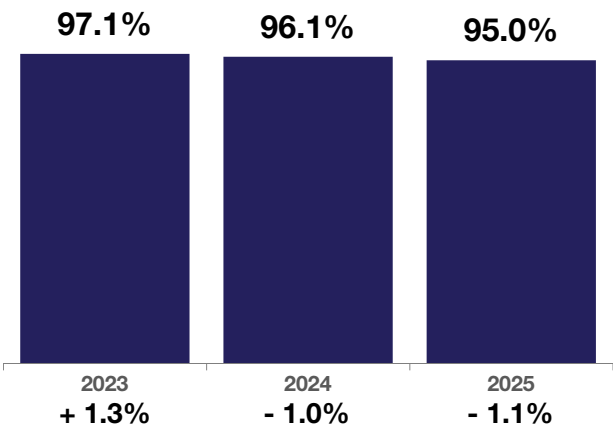


Percent of Original List Price Received

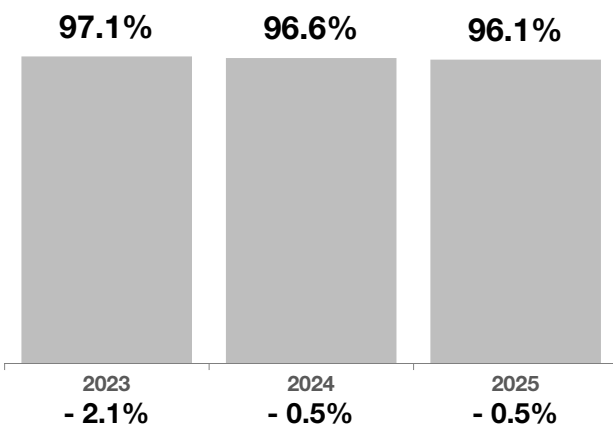
Percentage found when dividing a property's sales price by its original list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



November



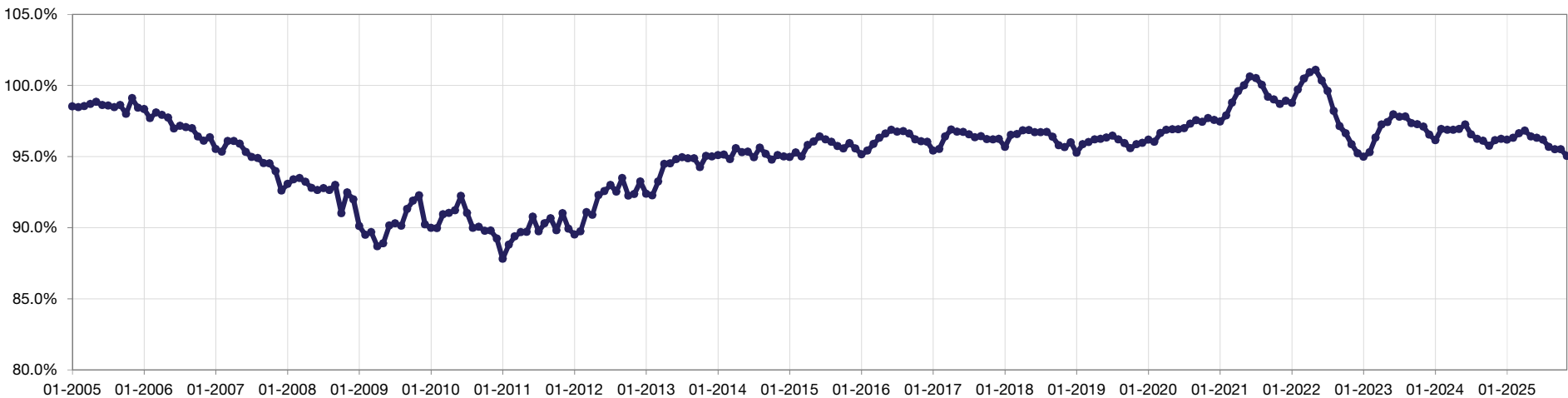
Year to Date



Pct. of Orig. Price Received		Prior Year	Percent Change
December 2024	96.2%	96.5%	-0.3%
January 2025	96.2%	96.1%	+0.1%
February 2025	96.3%	96.9%	-0.6%
March 2025	96.6%	96.9%	-0.3%
April 2025	96.8%	96.9%	-0.1%
May 2025	96.4%	96.9%	-0.5%
June 2025	96.3%	97.2%	-0.9%
July 2025	96.2%	96.5%	-0.3%
August 2025	95.7%	96.2%	-0.5%
September 2025	95.5%	96.1%	-0.6%
October 2025	95.5%	95.7%	-0.2%
November 2025	95.0%	96.1%	-1.1%
12-Month Avg*		96.1%	-0.5%

* Average Pct. of Orig. Price Received for all properties from December 2024 through November 2025. This is not the average of the individual figures above.

Historical Percent of Original List Price Received by Month

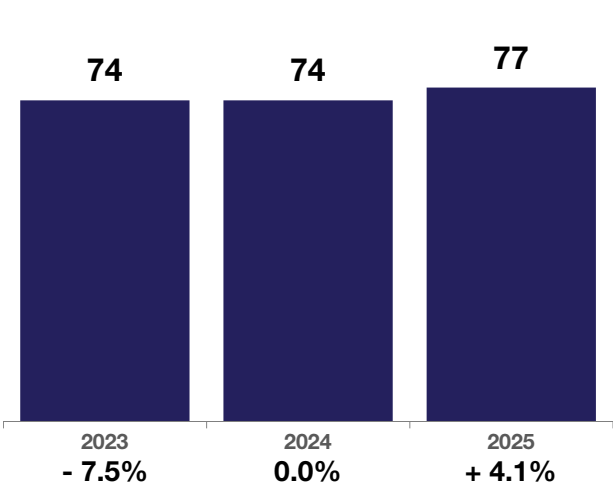


Housing Affordability Index

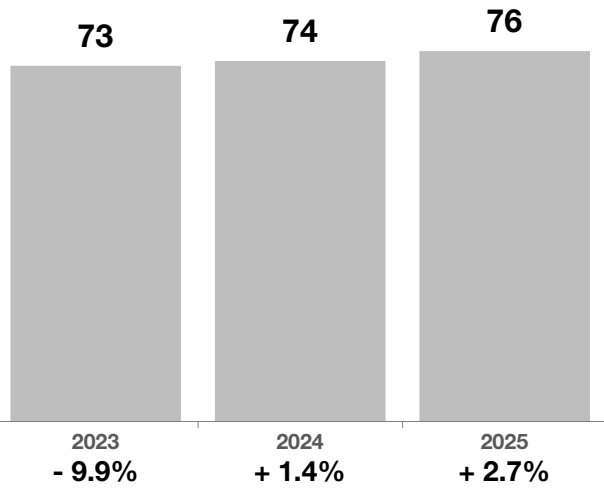
This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.



November

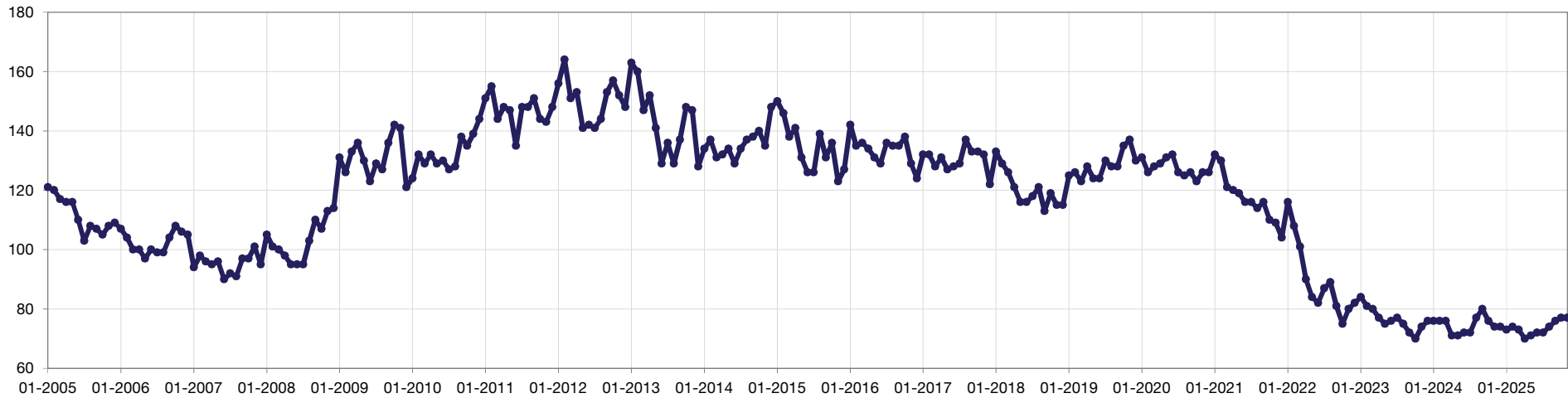


Year to Date



Affordability Index		Prior Year	Percent Change
December 2024	74	76	-2.6%
January 2025	73	76	-3.9%
February 2025	74	76	-2.6%
March 2025	73	76	-3.9%
April 2025	70	71	-1.4%
May 2025	71	71	0.0%
June 2025	72	72	0.0%
July 2025	72	72	0.0%
August 2025	74	77	-3.9%
September 2025	76	80	-5.0%
October 2025	77	76	+1.3%
November 2025	77	74	+4.1%
12-Month Avg	74	75	-1.6%

Historical Housing Affordability Index by Month

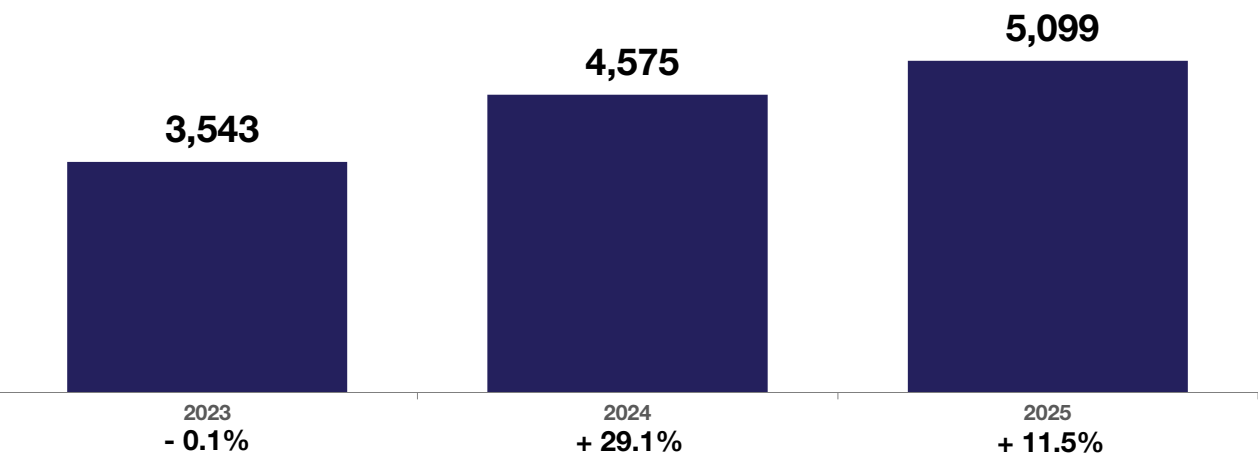


Inventory of Homes for Sale

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



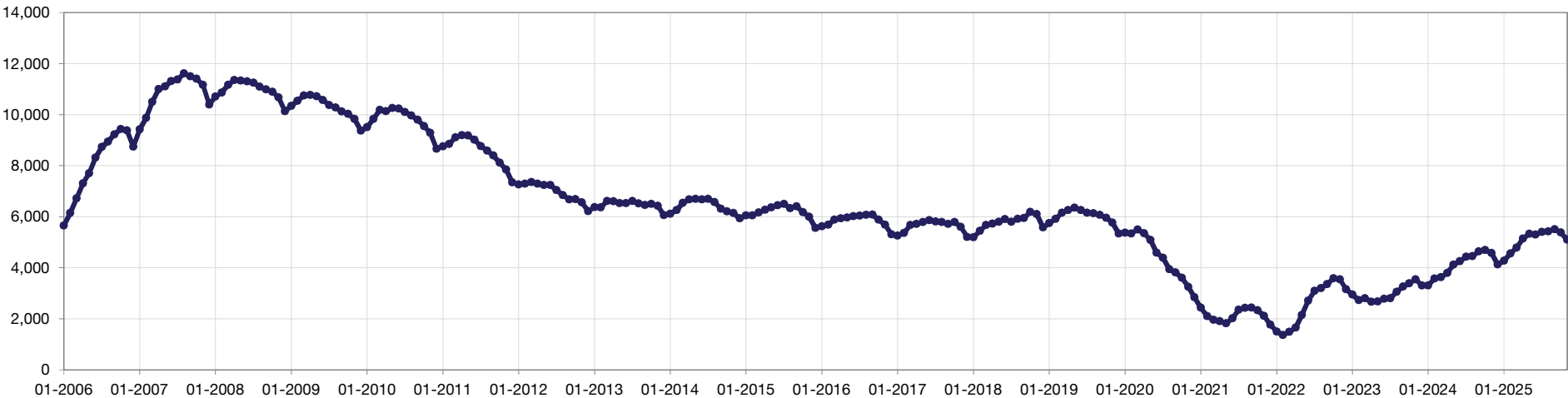
November



Homes for Sale		Prior Year	Percent Change
December 2024	4,123	3,302	+24.9%
January 2025	4,270	3,305	+29.2%
February 2025	4,560	3,572	+27.7%
March 2025	4,785	3,624	+32.0%
April 2025	5,143	3,791	+35.7%
May 2025	5,333	4,122	+29.4%
June 2025	5,300	4,252	+24.6%
July 2025	5,403	4,435	+21.8%
August 2025	5,426	4,454	+21.8%
September 2025	5,501	4,637	+18.6%
October 2025	5,385	4,694	+14.7%
November 2025	5,099	4,575	+11.5%
12-Month Avg*	5,027	4,064	+23.7%

* Homes for Sale for all properties from December 2024 through November 2025. This is not the average of the individual figures above.

Historical Inventory of Homes for Sale by Month

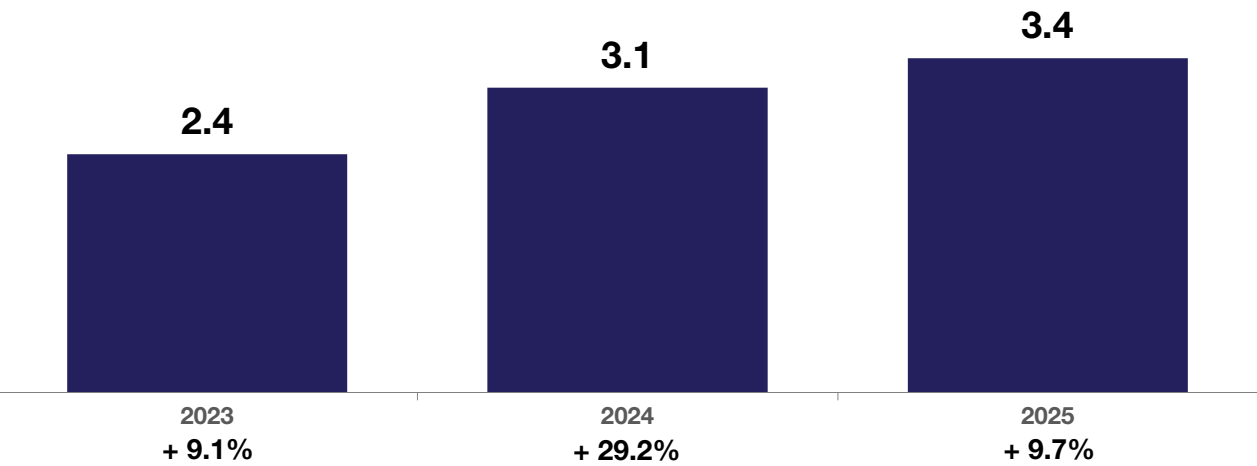


Months Supply of Inventory

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.



November



Months Supply		Prior Year	Percent Change
December 2024	2.8	2.3	+21.7%
January 2025	2.9	2.3	+26.1%
February 2025	3.1	2.5	+24.0%
March 2025	3.3	2.5	+32.0%
April 2025	3.5	2.6	+34.6%
May 2025	3.7	2.8	+32.1%
June 2025	3.6	2.9	+24.1%
July 2025	3.7	3.1	+19.4%
August 2025	3.7	3.1	+19.4%
September 2025	3.7	3.2	+15.6%
October 2025	3.6	3.2	+12.5%
November 2025	3.4	3.1	+9.7%
12-Month Avg*	3.4	2.8	+21.4%

* Months Supply for all properties from December 2024 through November 2025. This is not the average of the individual figures above.

Historical Months Supply of Inventory by Month

