

Monthly Indicators



December 2025

U.S. existing home sales ticked up 0.5% from the previous month to a seasonally adjusted annual rate of 4.13 million, marking the third consecutive monthly increase, according to the National Association of REALTORS® (NAR). However, sales were down 1.0% from the same period last year. Regionally, sales rose month-over-month in the Northeast and South, were unchanged in the West, and declined in the Midwest. On a year-over-year basis, sales were flat in the Northeast and South and fell in both the Midwest and West.

New Listings were up 14.6 percent to 1,351. Pending Sales increased 21.0 percent to 1,229. Inventory grew 8.9 percent to 4,489 units.

Median Sales Price was up 4.7 percent to \$434,020. Days on Market increased 12.0 percent to 56 days. Months Supply of Inventory was up 7.1 percent to 3.0 months.

The national median existing-home price continued to climb, rising 1.2% from a year ago to \$409,200, according to NAR. This year-over-year increase—the 29th consecutive monthly gain—reflects ongoing tightness in housing supply. At the end of November, there were 1.43 million units for sale, down 5.9% from the previous month but up 7.5% from the same time last year, representing a 4.2-month supply at the current sales pace.

Quick Facts

+ 6.6%	+ 4.7%	+ 7.1%
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.



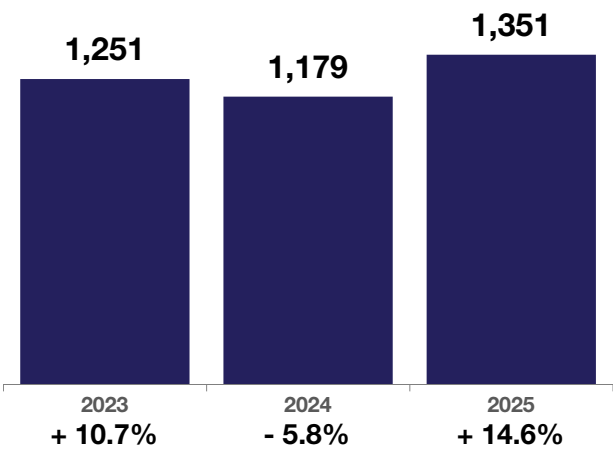
Key Metrics	Historical Sparkbars	12-2024	12-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
New Listings		1,179	1,351	+ 14.6%	23,793	25,531	+ 7.3%
Pending Sales		1,016	1,229	+ 21.0%	17,554	18,007	+ 2.6%
Closed Sales		1,399	1,492	+ 6.6%	17,477	17,776	+ 1.7%
Days on Market		50	56	+ 12.0%	40	50	+ 25.0%
Median Sales Price		\$414,556	\$434,020	+ 4.7%	\$416,805	\$426,947	+ 2.4%
Average Sales Price		\$612,226	\$632,197	+ 3.3%	\$627,200	\$647,587	+ 3.3%
Pct. of Orig. Price Received		96.2%	95.3%	- 0.9%	96.5%	96.0%	- 0.5%
Housing Affordability Index		74	75	+ 1.4%	74	77	+ 4.1%
Inventory of Homes for Sale		4,124	4,489	+ 8.9%	--	--	--
Months Supply of Inventory		2.8	3.0	+ 7.1%	--	--	--

New Listings

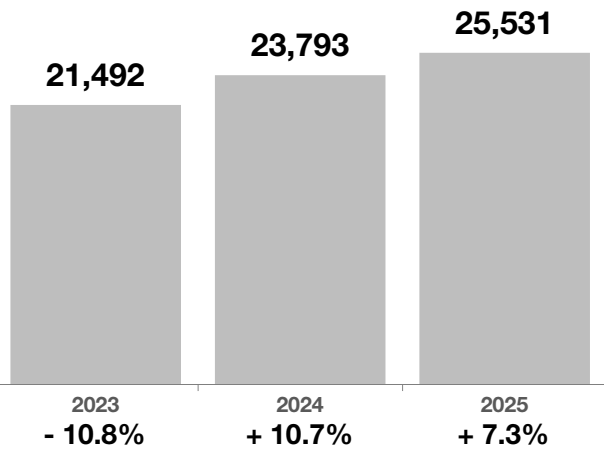
A count of the properties that have been newly listed on the market in a given month.



December

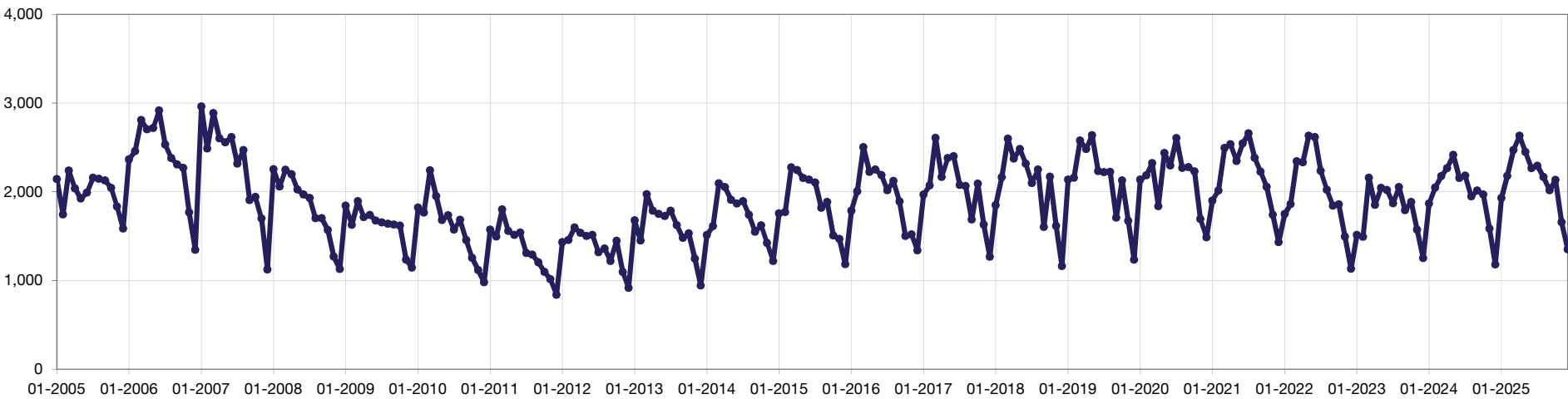


Year to Date



New Listings		Prior Year	Percent Change
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	2,133	1,967	+8.4%
November 2025	1,655	1,583	+4.5%
December 2025	1,351	1,179	+14.6%
12-Month Avg	2,128	1,983	+7.3%

Historical New Listings by Month

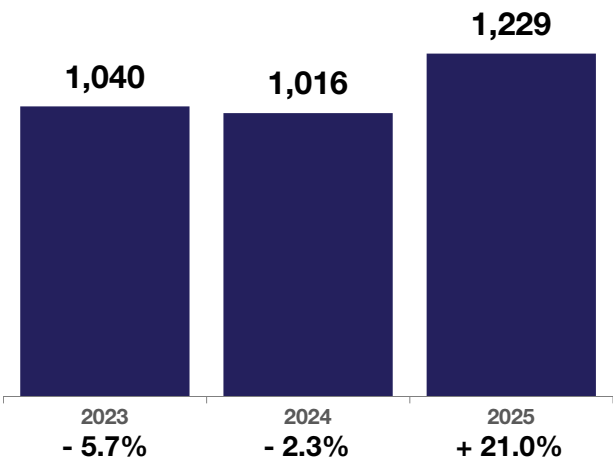


Pending Sales

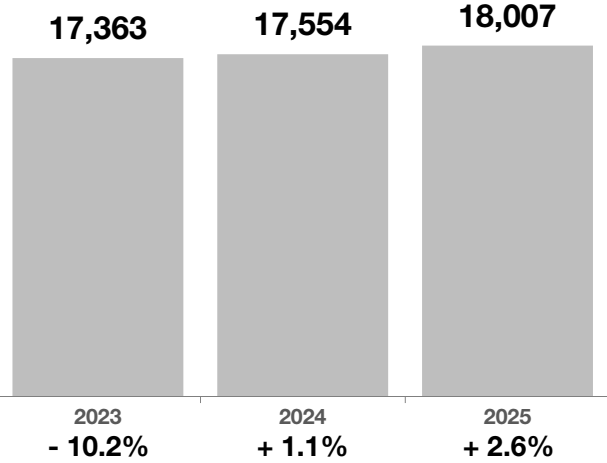
A count of the properties on which offers have been accepted in a given month.



December

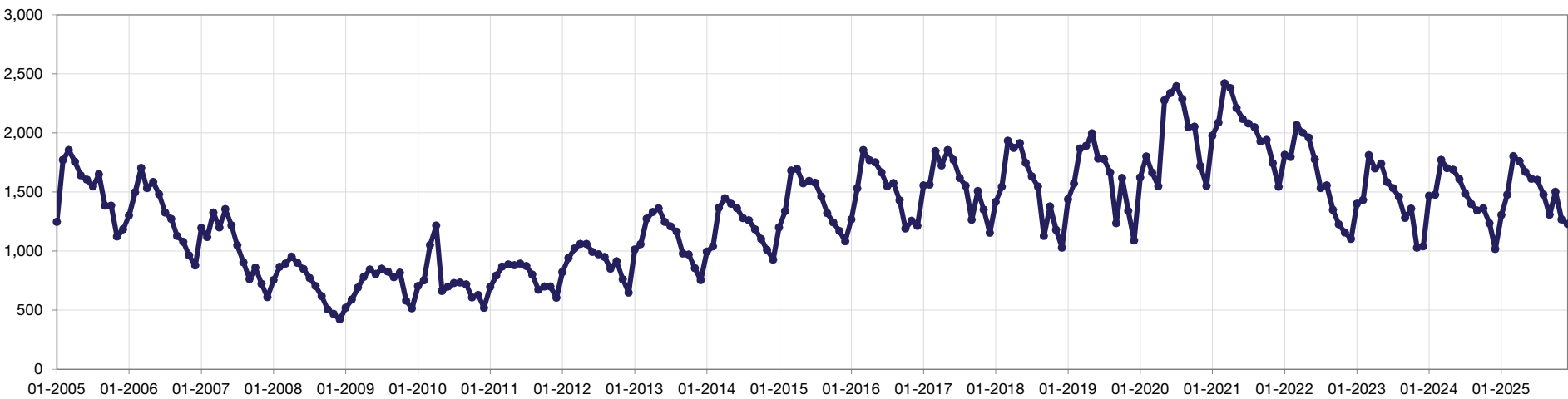


Year to Date



Pending Sales		Prior Year	Percent Change
January 2025	1,305	1,468	-11.1%
February 2025	1,477	1,475	+0.1%
March 2025	1,803	1,771	+1.8%
April 2025	1,760	1,700	+3.5%
May 2025	1,670	1,688	-1.1%
June 2025	1,610	1,609	+0.1%
July 2025	1,601	1,488	+7.6%
August 2025	1,478	1,398	+5.7%
September 2025	1,307	1,343	-2.7%
October 2025	1,501	1,362	+10.2%
November 2025	1,266	1,236	+2.4%
December 2025	1,229	1,016	+21.0%
12-Month Avg	1,501	1,463	+2.6%

Historical Pending Sales by Month

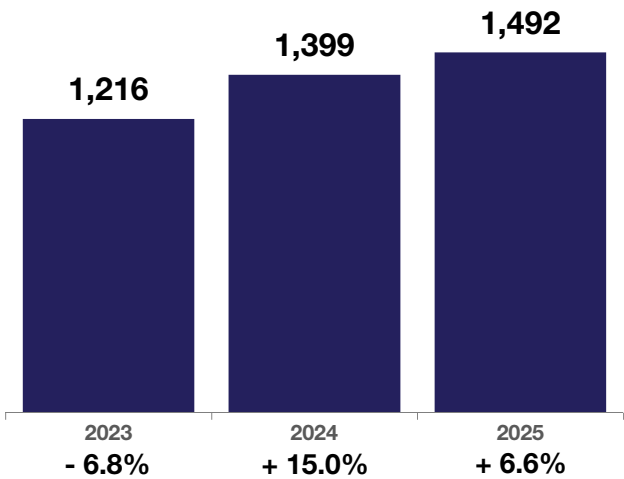


Closed Sales

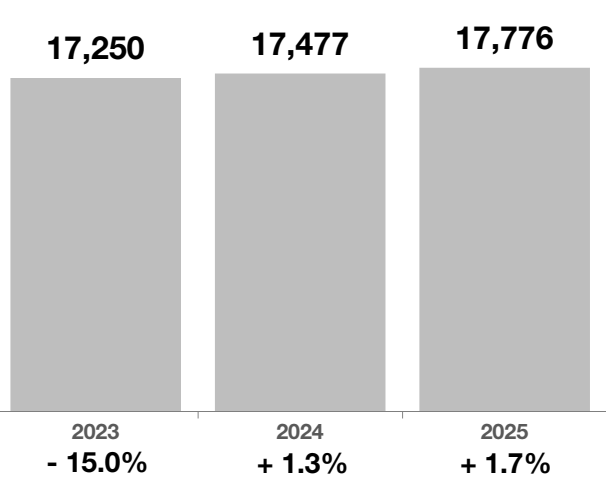
A count of the actual sales that closed in a given month.



December

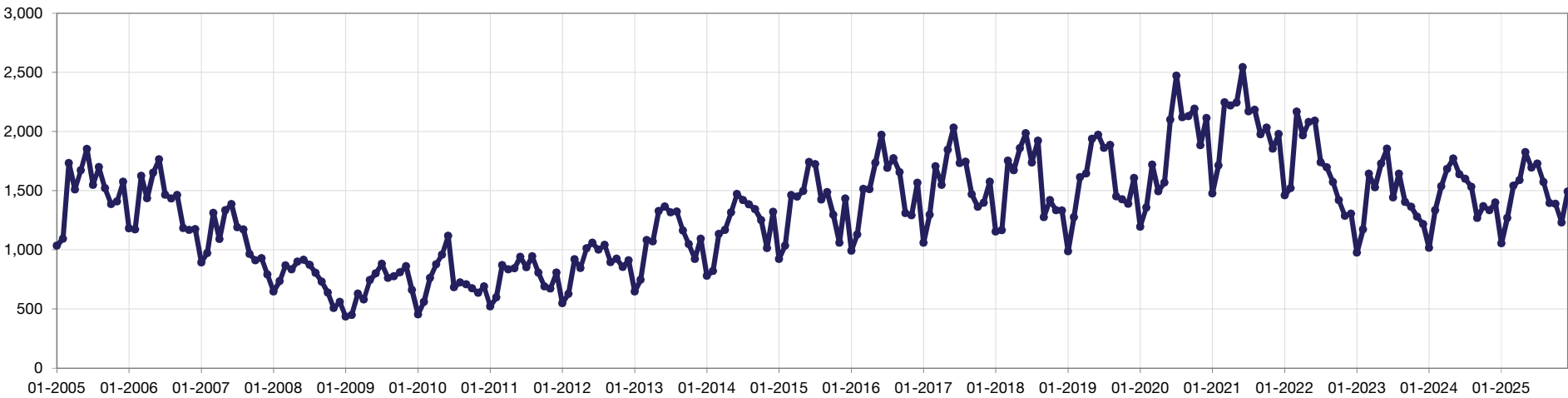


Year to Date



Closed Sales		Prior Year	Percent Change
January 2025	1,054	1,016	+3.7%
February 2025	1,269	1,334	-4.9%
March 2025	1,541	1,537	+0.3%
April 2025	1,588	1,683	-5.6%
May 2025	1,824	1,770	+3.1%
June 2025	1,695	1,637	+3.5%
July 2025	1,728	1,600	+8.0%
August 2025	1,573	1,533	+2.6%
September 2025	1,394	1,268	+9.9%
October 2025	1,387	1,367	+1.5%
November 2025	1,231	1,333	-7.7%
December 2025	1,492	1,399	+6.6%
12-Month Avg	1,481	1,456	+1.7%

Historical Closed Sales by Month

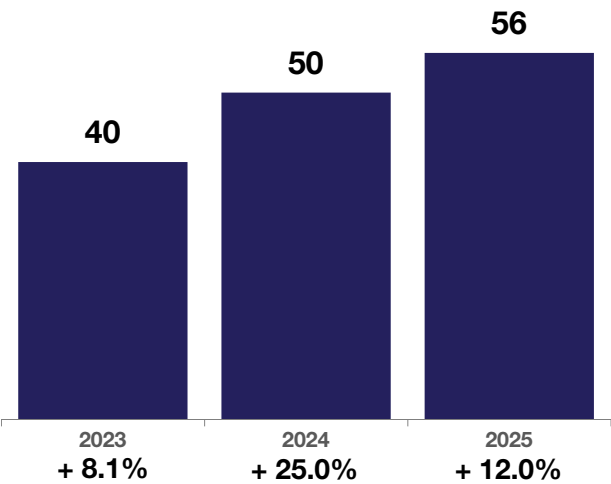


Days on Market Until Sale

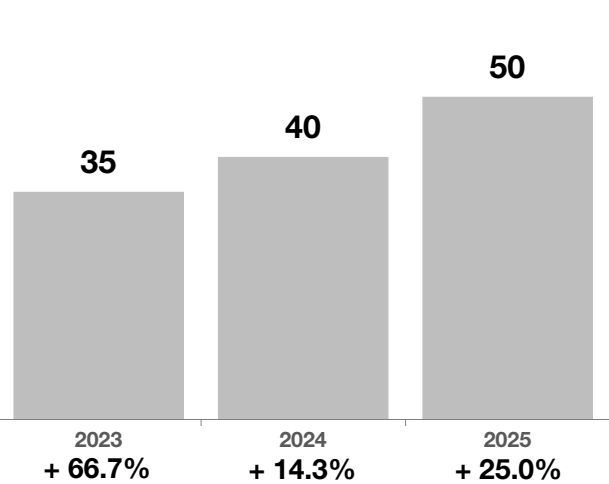
Average number of days between when a property is listed and when an offer is accepted in a given month.



December



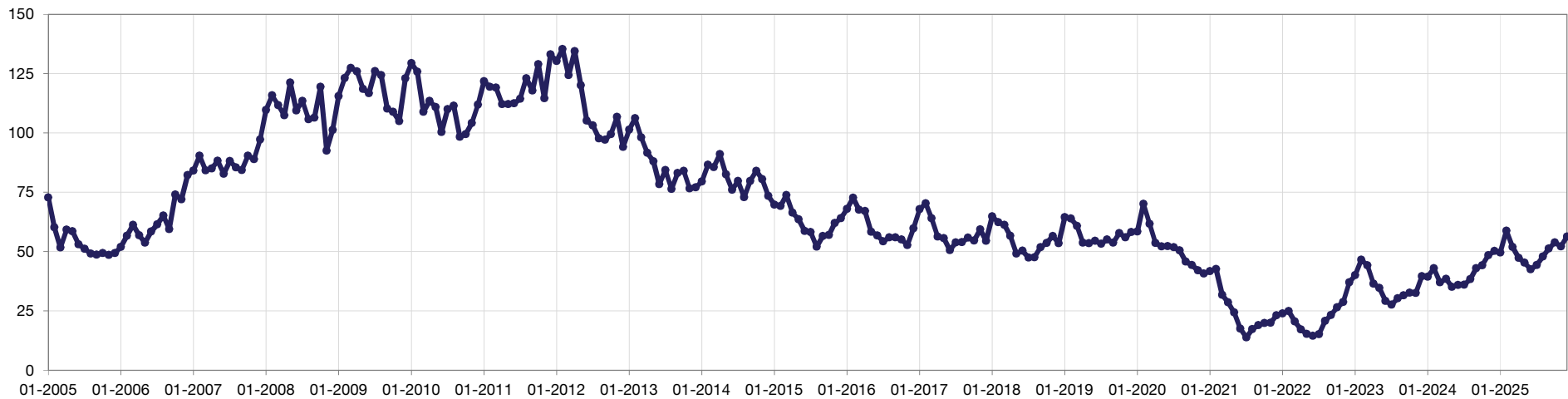
Year to Date



Days on Market		Prior Year	Percent Change
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%
December 2025	56	50	+12.0%
12-Month Avg*	50	40	+25.0%

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

Historical Days on Market Until Sale by Month

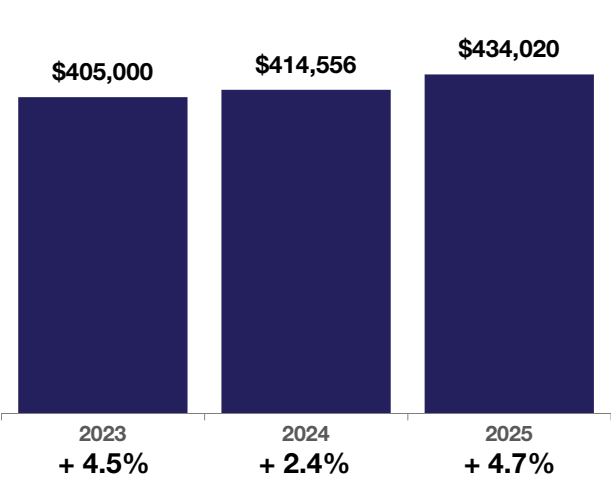


Median Sales Price

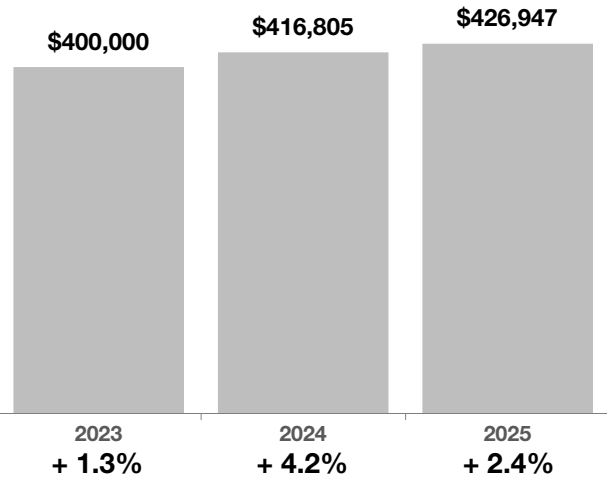
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



December



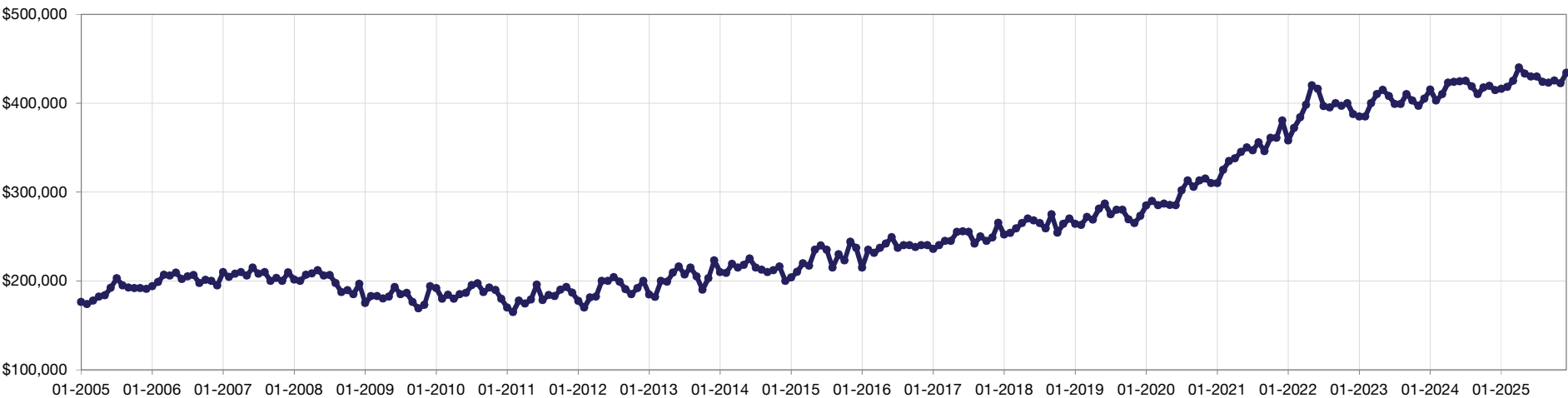
Year to Date



	Median Sales Price	Prior Year	Percent Change
January 2025	\$416,159	\$415,155	+0.2%
February 2025	\$418,325	\$403,046	+3.8%
March 2025	\$425,000	\$410,000	+3.7%
April 2025	\$440,000	\$423,000	+4.0%
May 2025	\$433,213	\$424,000	+2.2%
June 2025	\$430,000	\$424,400	+1.3%
July 2025	\$430,000	\$425,000	+1.2%
August 2025	\$424,000	\$418,920	+1.2%
September 2025	\$423,009	\$410,000	+3.2%
October 2025	\$425,445	\$417,465	+1.9%
November 2025	\$422,295	\$419,314	+0.7%
December 2025	\$434,020	\$414,556	+4.7%
12-Month Med*	\$426,947	\$416,805	+2.4%

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

Historical Median Sales Price by Month

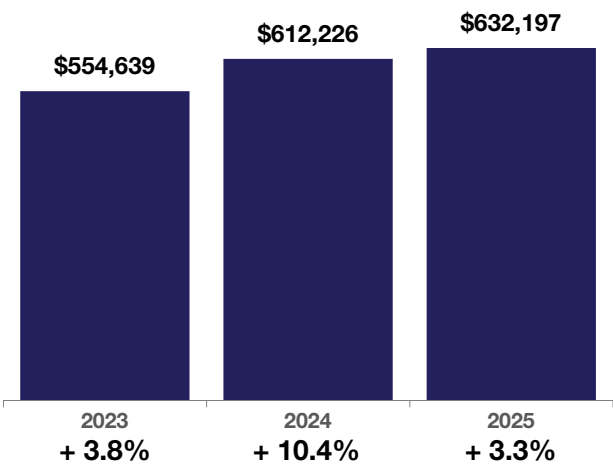


Average Sales Price

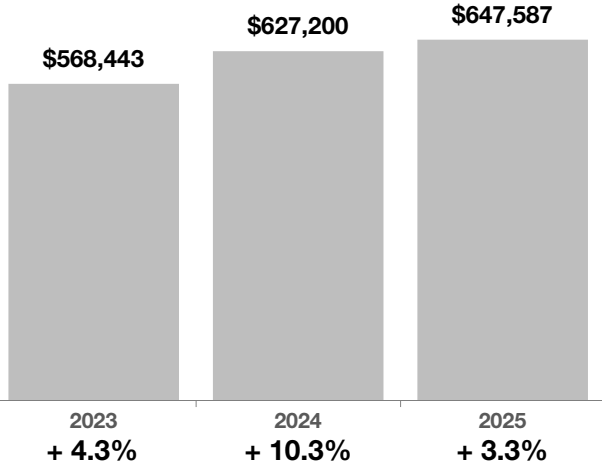
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



December



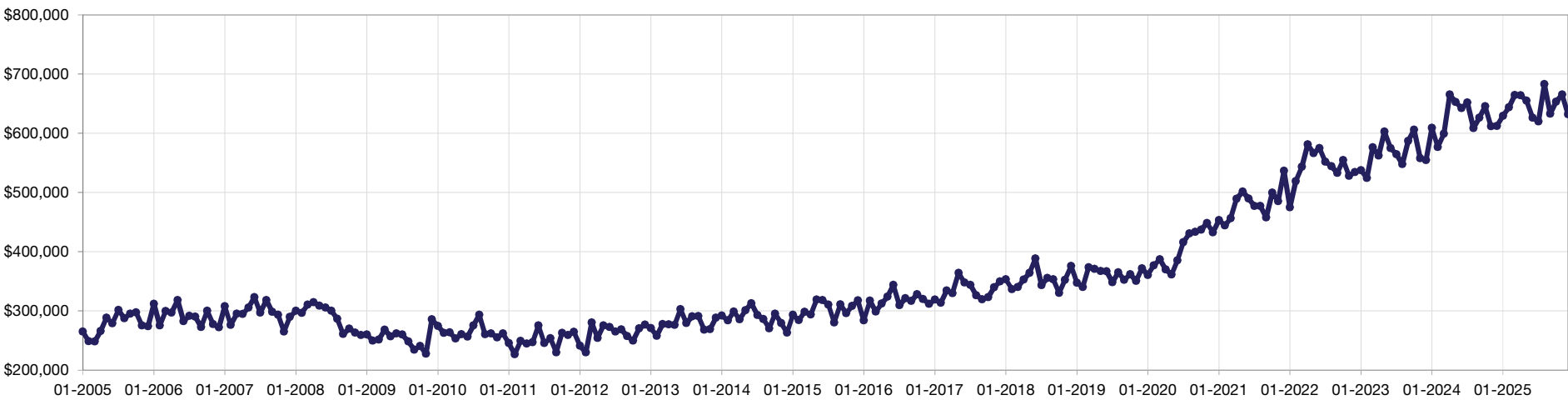
Year to Date



Avg. Sales Price	Prior Year	Percent Change
January 2025	\$629,308	\$609,200 +3.3%
February 2025	\$643,855	\$576,662 +11.7%
March 2025	\$664,421	\$599,090 +10.9%
April 2025	\$664,160	\$665,456 -0.2%
May 2025	\$654,972	\$652,926 +0.3%
June 2025	\$626,388	\$642,555 -2.5%
July 2025	\$620,050	\$651,970 -4.9%
August 2025	\$682,782	\$608,651 +12.2%
September 2025	\$632,967	\$626,103 +1.1%
October 2025	\$653,110	\$645,800 +1.1%
November 2025	\$665,611	\$611,878 +8.8%
December 2025	\$632,197	\$612,226 +3.3%
12-Month Avg*	\$647,485	\$625,210 +3.6%

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

Historical Average Sales Price by Month

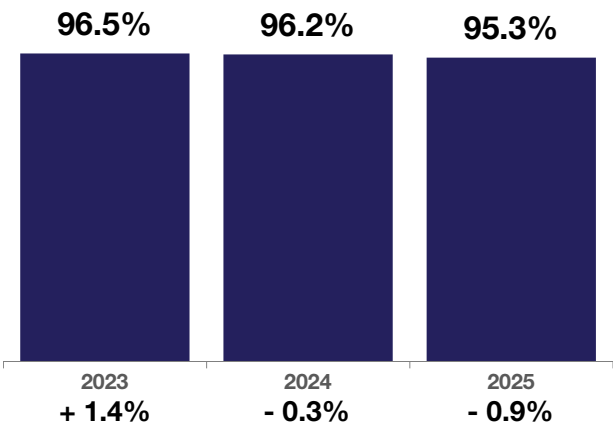


Percent of Original List Price Received

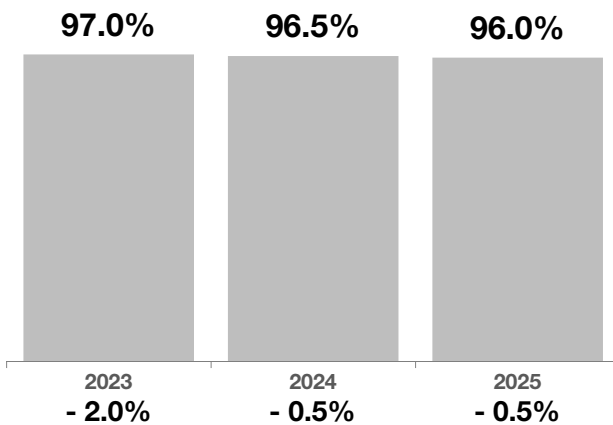
Percentage found when dividing a property's sales price by its original list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



December



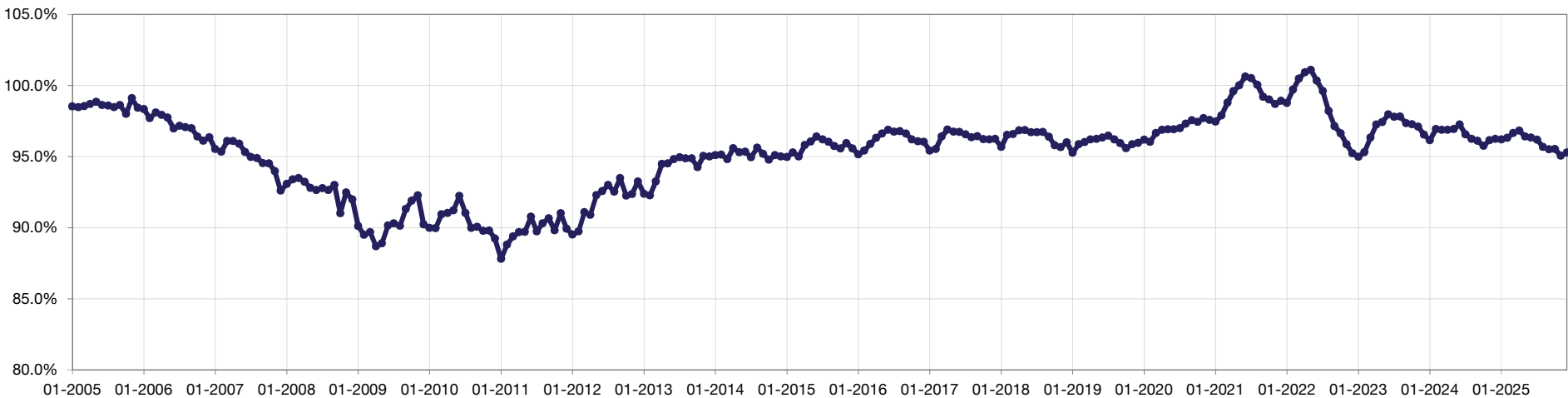
Year to Date



Pct. of Orig. Price Received		Prior Year	Percent Change
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	95.1%	96.1%	-1.0%
December 2025	95.3%	96.2%	-0.9%
12-Month Avg*		96.5%	-0.5%

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

Historical Percent of Original List Price Received by Month

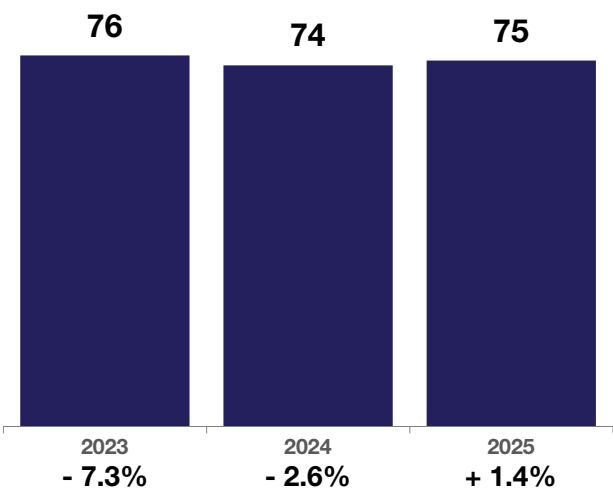


Housing Affordability Index

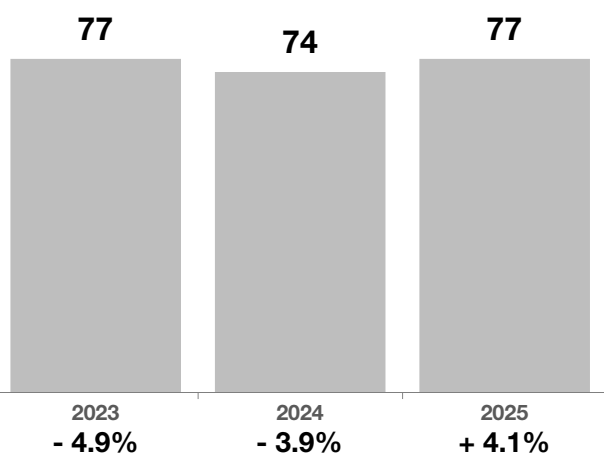
This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.



December

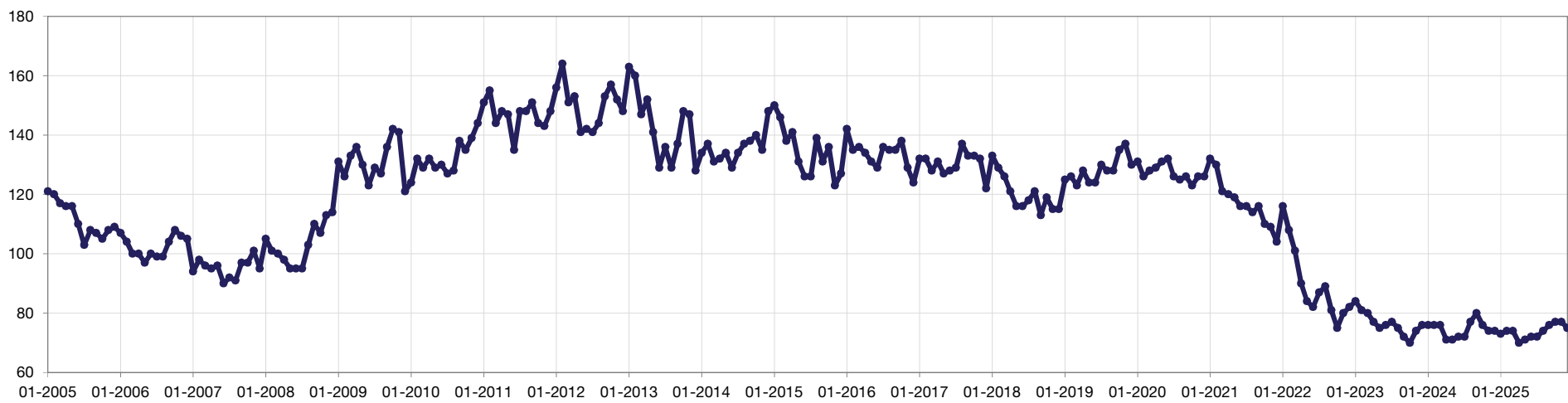


Year to Date



Affordability Index		Prior Year	Percent Change
January 2025	73	76	-3.9%
February 2025	74	76	-2.6%
March 2025	74	76	-2.6%
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%
December 2025	75	74	+1.4%
12-Month Avg	74	75	-1.1%

Historical Housing Affordability Index by Month

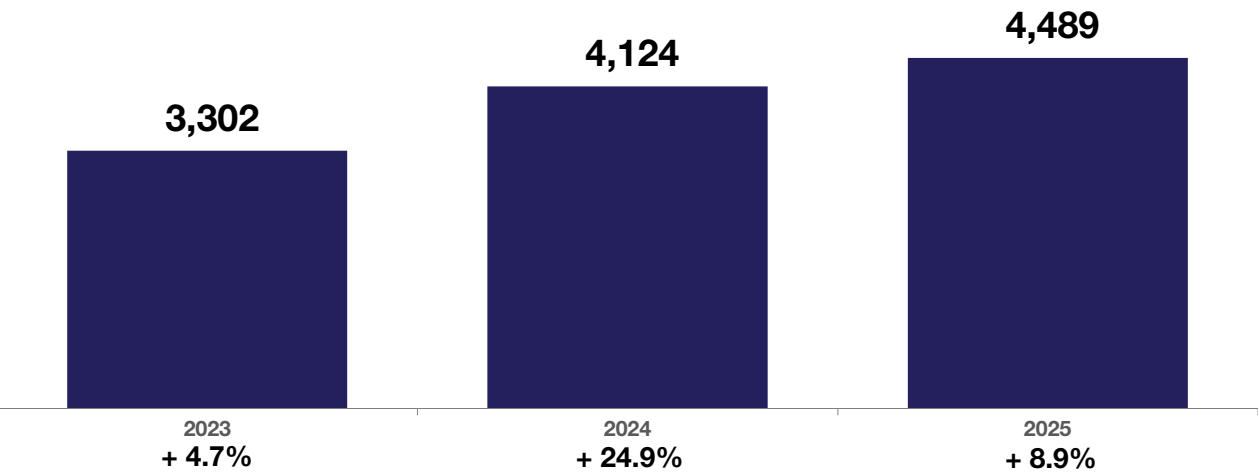


Inventory of Homes for Sale

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



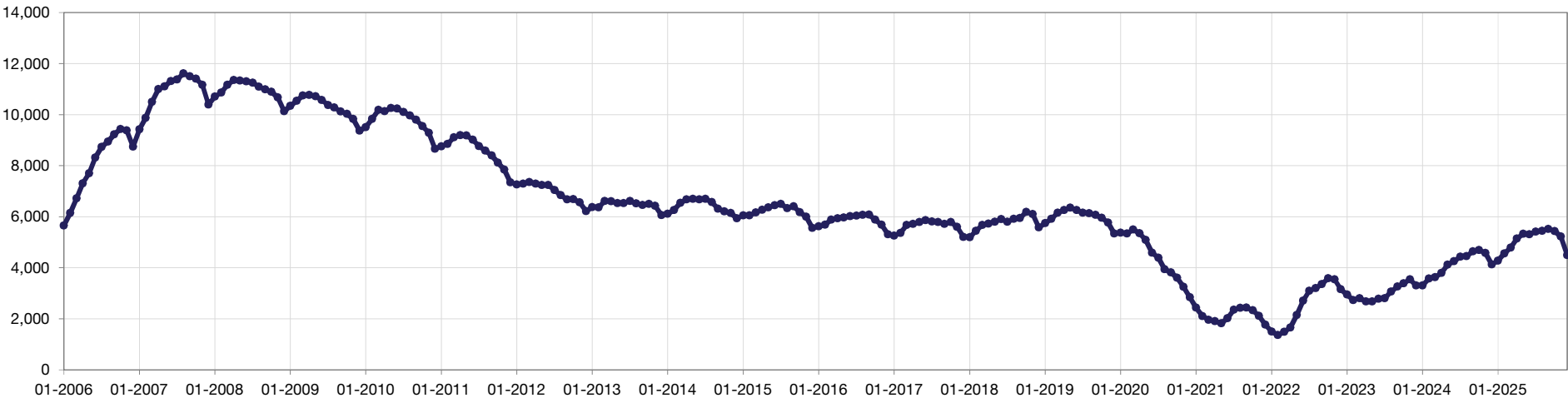
December



Homes for Sale		Prior Year	Percent Change
January 2025	4,272	3,305	+29.3%
February 2025	4,561	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	5,304	4,252	+24.7%
July 2025	5,409	4,435	+22.0%
August 2025	5,441	4,454	+22.2%
September 2025	5,520	4,637	+19.0%
October 2025	5,433	4,694	+15.7%
November 2025	5,226	4,576	+14.2%
December 2025	4,489	4,124	+8.9%
12-Month Avg*	5,076	4,132	+22.8%

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

Historical Inventory of Homes for Sale by Month

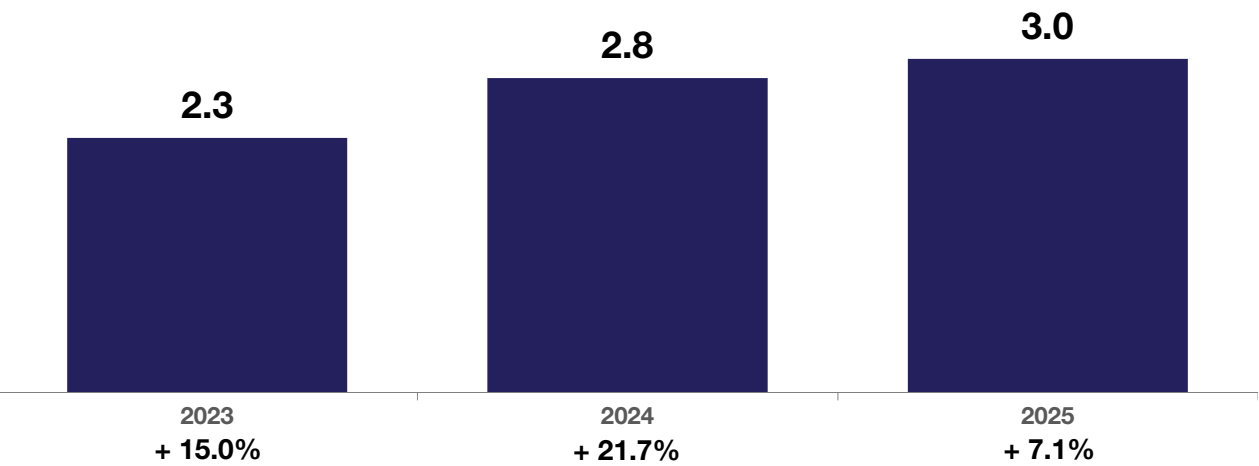


Months Supply of Inventory

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.



December



Months Supply		Prior Year	Percent Change
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	3.8	3.2	+18.8%
October 2025	3.7	3.2	+15.6%
November 2025	3.5	3.1	+12.9%
December 2025	3.0	2.8	+7.1%
12-Month Avg*	3.5	2.8	+25.0%

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

Historical Months Supply of Inventory by Month

