Monthly Market Detail - December 2025
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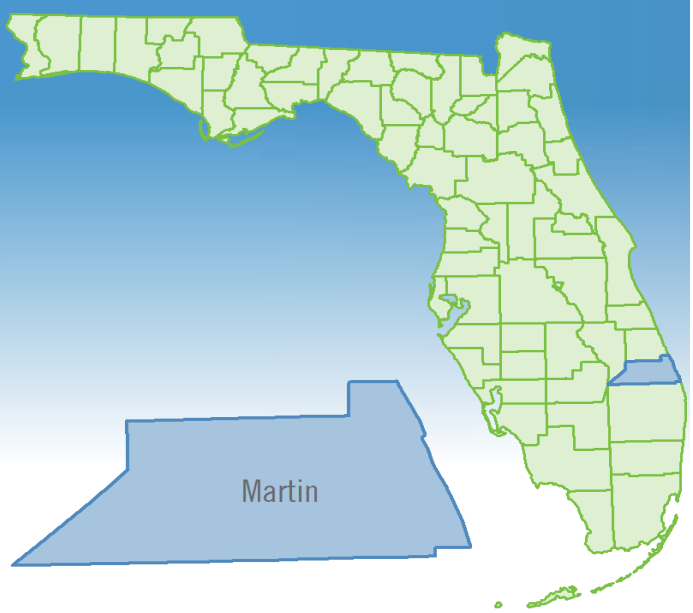


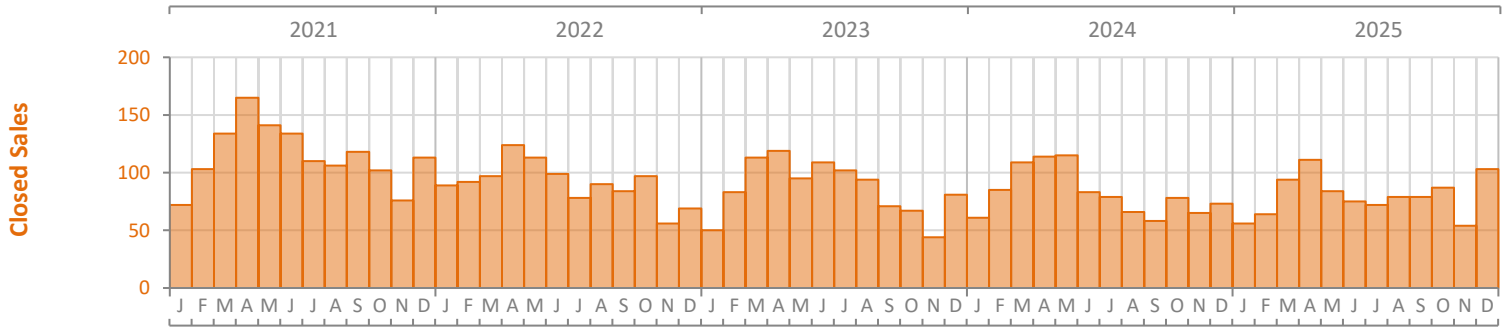
Summary Statistics	December 2025	December 2024	Percent Change Year-over-Year
Closed Sales	103	73	41.1%
Paid in Cash	59	40	47.5%
Median Sale Price	$275,000	$240,000	14.6%
Average Sale Price	$371,949	$318,399	16.8%
Dollar Volume	$38.3 Million	$23.2 Million	64.8%
Median Percent of Original List Price Received	92.3%	89.7%	2.9%
Median Time to Contract	68 Days	65 Days	4.6%
Median Time to Sale	107 Days	96 Days	11.5%
New Pending Sales	90	57	57.9%
New Listings	131	116	12.9%
Pending Inventory	107	92	16.3%
Inventory (Active Listings)	637	635	0.3%
Months Supply of Inventory	8.0	7.7	3.9%

Closed Sales

The number of sales transactions which closed during the month

Economists' note : Closed Sales are one of the simplest—yet most important—indicators for the residential real estate market. When comparing Closed Sales across markets of different sizes, we recommend comparing the percent changes in sales rather than the number of sales. Closed Sales (and many other market metrics) are affected by seasonal cycles, so actual trends are more accurately represented by year-over-year changes (i.e. comparing a month's sales to the amount of sales in the same month in the previous year), rather than changes from one month to the next.

Month	Closed Sales	Percent Change Year-over-Year
Year-to-Date	958	-2.8%
December 2025	**103**	**41.1%**
November 2025	54	-16.9%
October 2025	87	11.5%
September 2025	79	36.2%
August 2025	79	19.7%
July 2025	72	-8.9%
June 2025	75	-9.6%
May 2025	84	-27.0%
April 2025	111	-2.6%
March 2025	94	-13.8%
February 2025	64	-24.7%
January 2025	56	-8.2%
December 2024	73	-9.9%



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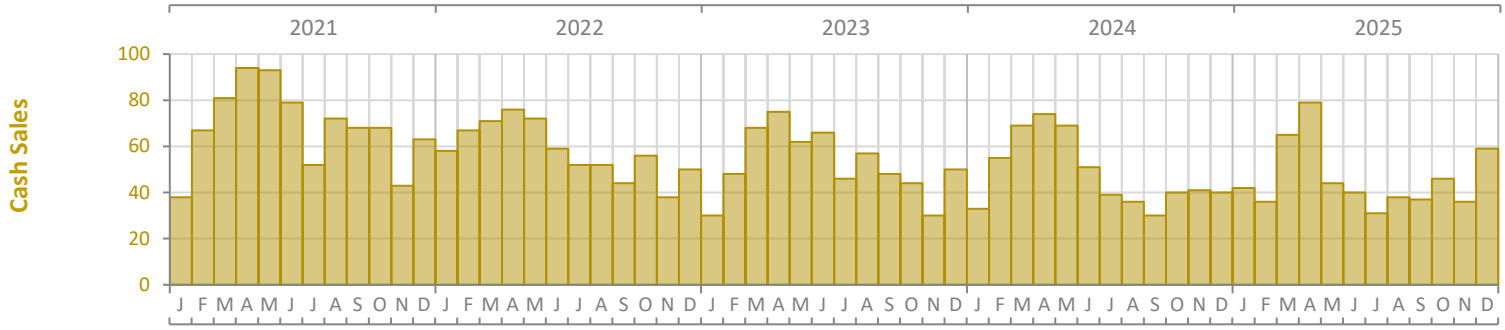
Cash Sales

The number of Closed Sales during the month in which buyers exclusively paid in cash

Economists' note : Cash Sales can be a useful indicator of the extent to which investors are participating in the market. Why? Investors are far more likely to have the funds to purchase a home available up front, whereas the typical homebuyer requires a mortgage or some other form of financing. There are, of course, many possible exceptions, so this statistic should be interpreted with care.

Month	Cash Sales	Percent Change Year-over-Year
Year-to-Date	553	-4.2%
December 2025	**59**	**47.5%**
November 2025	36	-12.2%
October 2025	46	15.0%
September 2025	37	23.3%
August 2025	38	5.6%
July 2025	31	-20.5%
June 2025	40	-21.6%
May 2025	44	-36.2%
April 2025	79	6.8%
March 2025	65	-5.8%
February 2025	36	-34.5%
January 2025	42	27.3%
December 2024	40	-20.0%

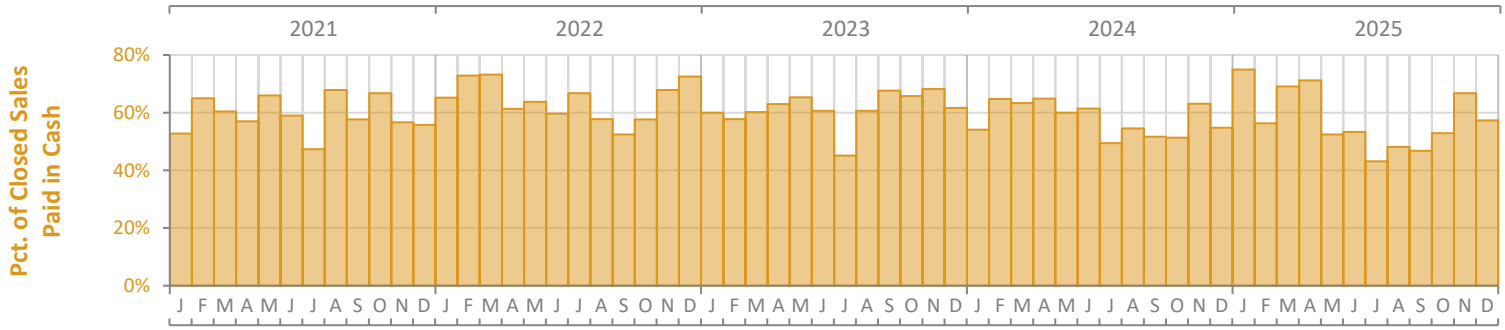


Cash Sales as a Percentage of Closed Sales

The percentage of Closed Sales during the month which were Cash Sales

Economists' note : This statistic is simply another way of viewing Cash Sales. The remaining percentages of Closed Sales (i.e. those not paid fully in cash) each month involved some sort of financing, such as mortgages, owner/seller financing, assumed loans, etc.

Month	Percent of Closed Sales Paid in Cash	Percent Change Year-over-Year
Year-to-Date	57.7%	-1.4%
December 2025	**57.3%**	**4.6%**
November 2025	66.7%	5.7%
October 2025	52.9%	3.1%
September 2025	46.8%	-9.5%
August 2025	48.1%	-11.7%
July 2025	43.1%	-12.8%
June 2025	53.3%	-13.2%
May 2025	52.4%	-12.7%
April 2025	71.2%	9.7%
March 2025	69.1%	9.2%
February 2025	56.3%	-13.0%
January 2025	75.0%	38.6%
December 2024	54.8%	-11.2%



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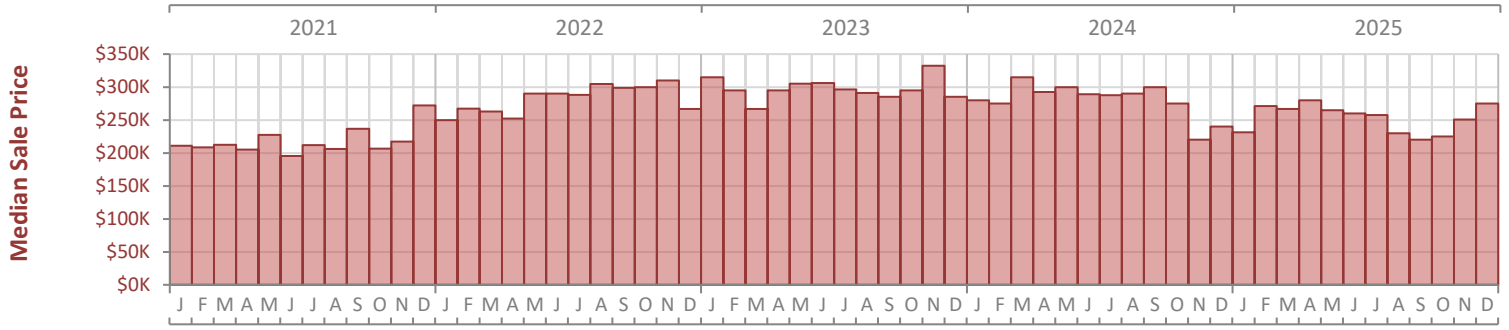
Median Sale Price

The median sale price reported for the month (i.e. 50% of sales were above and 50% of sales were below)

Economists' note : Median Sale Price is our preferred summary statistic for price activity because, unlike Average Sale Price, Median Sale Price is not sensitive to high sale prices for small numbers of homes that may not be characteristic of the market area. Keep in mind that median price trends over time are not always solely caused by changes in the general value of local real estate. Median sale price only reflects the values of the homes that *sold* each month, and the mix of the types of homes that sell can change over time.

Month	Median Sale Price	Percent Change Year-over-Year
Year-to-Date	$260,000	-9.1%
December 2025	**$275,000**	**14.6%**
November 2025	$251,000	14.1%
October 2025	$225,000	-18.2%
September 2025	$220,000	-26.7%
August 2025	$230,000	-20.7%
July 2025	$257,500	-10.5%
June 2025	$260,000	-10.0%
May 2025	$265,000	-11.6%
April 2025	$280,000	-4.3%
March 2025	$267,000	-15.2%
February 2025	$271,000	-1.5%
January 2025	$231,438	-17.3%
December 2024	$240,000	-15.8%

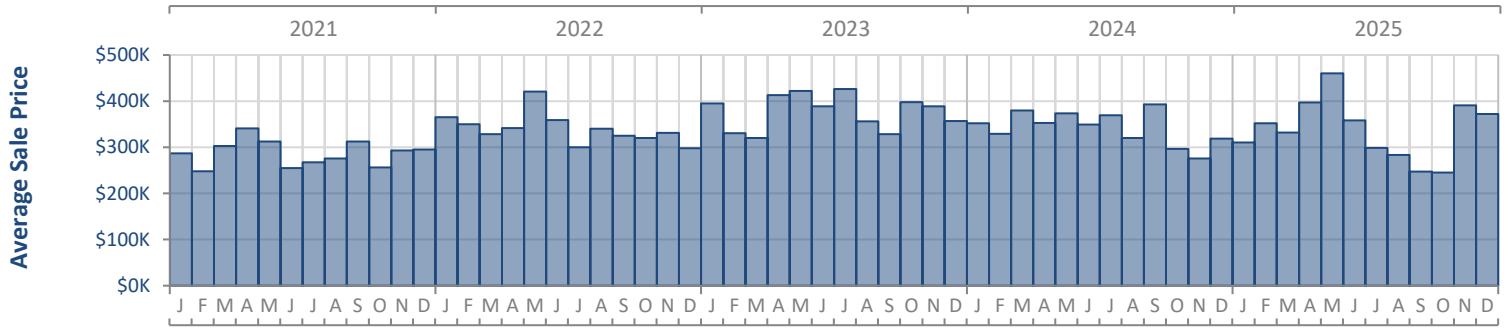


Average Sale Price

The average sale price reported for the month (i.e. total sales in dollars divided by the number of sales)

Economists' note : Usually, we prefer Median Sale Price over Average Sale Price as a summary statistic for home prices. However, Average Sale Price does have its uses—particularly when it is analyzed alongside the Median Sale Price. For one, the relative difference between the two statistics can provide some insight into the market for higher-end homes in an area.

Month	Average Sale Price	Percent Change Year-over-Year
Year-to-Date	$339,117	-1.7%
December 2025	**$371,949**	**16.8%**
November 2025	$391,018	41.7%
October 2025	$245,019	-17.3%
September 2025	$247,529	-37.0%
August 2025	$283,124	-11.5%
July 2025	$298,322	-19.2%
June 2025	$358,154	2.6%
May 2025	$459,999	23.3%
April 2025	$397,074	12.6%
March 2025	$332,108	-12.6%
February 2025	$352,334	7.1%
January 2025	$310,480	-11.7%
December 2024	$318,399	-10.7%



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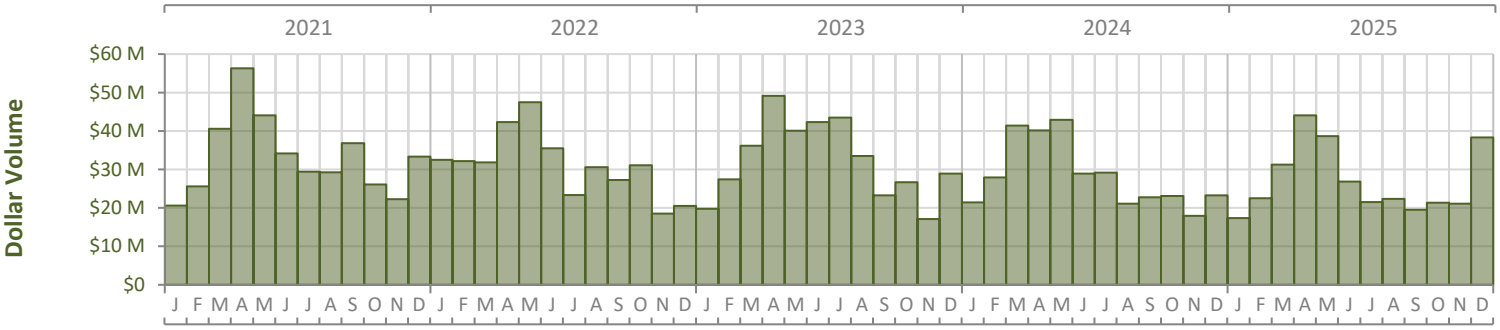
Dollar Volume

The sum of the sale prices for all sales which closed during the month

Economists' note : Dollar Volume is simply the sum of all sale prices in a given time period, and can quickly be calculated by multiplying Closed Sales by Average Sale Price. It is a strong indicator of the health of the real estate industry in a market, and is of particular interest to real estate professionals, investors, analysts, and government agencies. Potential home sellers and home buyers, on the other hand, will likely be better served by paying attention to trends in the two components of Dollar Volume (i.e. sales and prices) individually.

Month	Dollar Volume	Percent Change Year-over-Year
Year-to-Date	$324.9 Million	-4.5%
December 2025	**$38.3 Million**	**64.8%**
November 2025	$21.1 Million	17.7%
October 2025	$21.3 Million	-7.7%
September 2025	$19.6 Million	-14.1%
August 2025	$22.4 Million	5.9%
July 2025	$21.5 Million	-26.4%
June 2025	$26.9 Million	-7.3%
May 2025	$38.6 Million	-10.0%
April 2025	$44.1 Million	9.7%
March 2025	$31.2 Million	-24.6%
February 2025	$22.5 Million	-19.3%
January 2025	$17.4 Million	-19.0%
December 2024	$23.2 Million	-19.5%

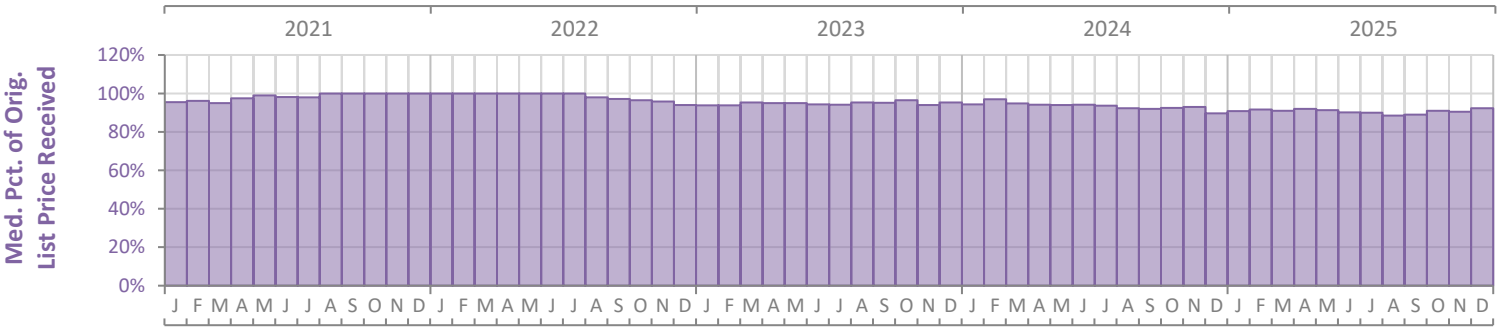


Median Percent of Original List Price Received

The median of the sale price (as a percentage of the original list price) across all properties selling during the month

Economists' note : The Median Percent of Original List Price Received is useful as an indicator of market recovery, since it typically rises as buyers realize that the market may be moving away from them and they need to match the selling price (or better it) in order to get a contract on the house. This is usually the last measure to indicate a market has shifted from down to up, so it is what we would call a *lagging* indicator.

Month	Med. Pct. of Orig. List Price Received	Percent Change Year-over-Year
Year-to-Date	90.6%	-3.4%
December 2025	**92.3%**	**2.9%**
November 2025	90.5%	-2.7%
October 2025	91.0%	-1.6%
September 2025	89.0%	-3.3%
August 2025	88.4%	-4.2%
July 2025	90.0%	-3.8%
June 2025	90.1%	-4.3%
May 2025	91.3%	-2.8%
April 2025	91.9%	-2.4%
March 2025	91.0%	-4.0%
February 2025	91.7%	-5.4%
January 2025	90.8%	-3.7%
December 2024	89.7%	-5.9%



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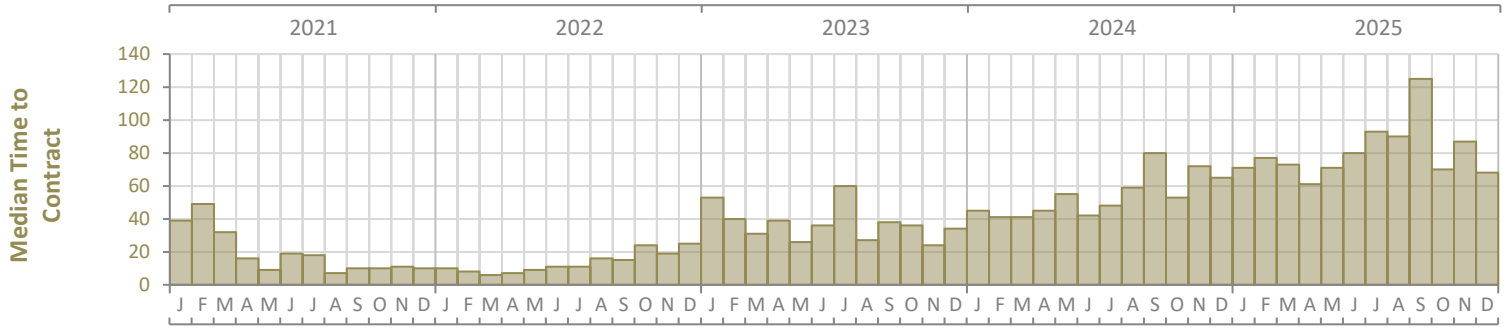
Median Time to Contract

The median number of days between the listing date and contract date for all Closed Sales during the month

Economists' note : Like Time to Sale, Time to Contract is a measure of the length of the home selling process calculated for sales which closed during the month. The difference is that Time to Contract measures the number of days between the initial listing of a property and the signing of the contract which eventually led to the closing of the sale. When the gap between Median Time to Contract and Median Time to Sale grows, it is usually a sign of longer closing times and/or declining numbers of cash sales.

Month	Median Time to Contract	Percent Change Year-over-Year
Year-to-Date	85 Days	54.5%
December 2025	**68 Days**	**4.6%**
November 2025	87 Days	20.8%
October 2025	70 Days	32.1%
September 2025	125 Days	56.3%
August 2025	90 Days	52.5%
July 2025	93 Days	93.8%
June 2025	80 Days	90.5%
May 2025	71 Days	29.1%
April 2025	61 Days	35.6%
March 2025	73 Days	78.0%
February 2025	77 Days	87.8%
January 2025	71 Days	57.8%
December 2024	65 Days	91.2%

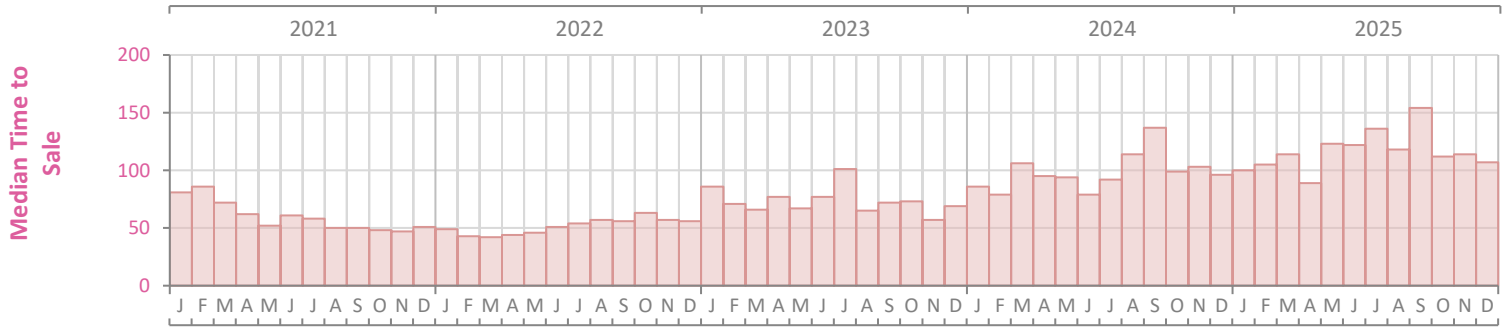


Median Time to Sale

The median number of days between the listing date and closing date for all Closed Sales during the month

Economists' note : Time to Sale is a measure of the length of the home selling process, calculated as the number of days between the initial listing of a property and the closing of the sale. *Median* Time to Sale is the amount of time the "middle" property selling this month was on the market. That is, 50% of homes selling this month took *less* time to sell, and 50% of homes took *more* time to sell. Median Time to Sale gives a more accurate picture than Average Time to Sale, which can be skewed upward by small numbers of properties taking an abnormally long time to sell.

Month	Median Time to Sale	Percent Change Year-over-Year
Year-to-Date	125 Days	17.9%
December 2025	**107 Days**	**11.5%**
November 2025	114 Days	10.7%
October 2025	112 Days	13.1%
September 2025	154 Days	12.4%
August 2025	118 Days	3.5%
July 2025	136 Days	47.8%
June 2025	122 Days	54.4%
May 2025	123 Days	30.9%
April 2025	89 Days	-6.3%
March 2025	114 Days	7.5%
February 2025	105 Days	32.9%
January 2025	100 Days	16.3%
December 2024	96 Days	39.1%



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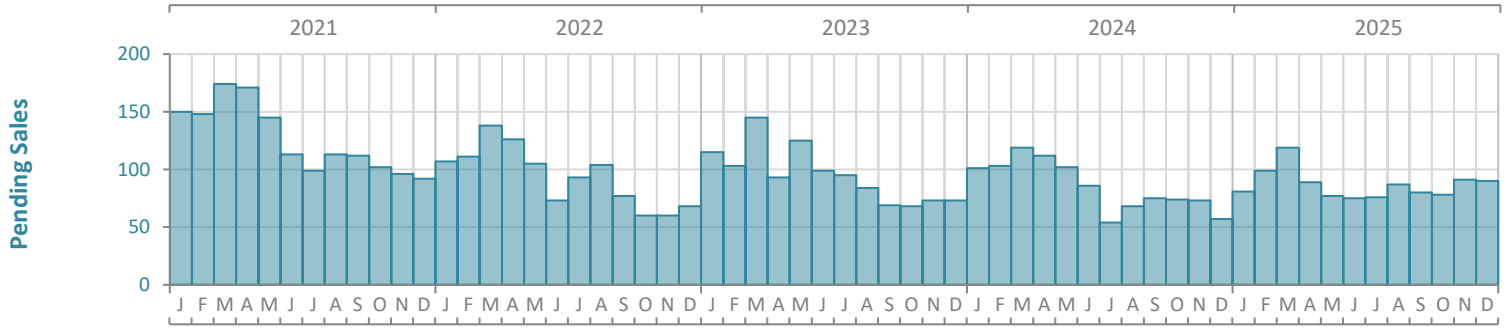
New Pending Sales

The number of listed properties that went under contract during the month

Economists' note : Because of the typical length of time it takes for a sale to close, economists consider Pending Sales to be a decent indicator of potential future Closed Sales. It is important to bear in mind, however, that not all Pending Sales will be closed successfully. So, the effectiveness of Pending Sales as a future indicator of Closed Sales is susceptible to changes in market conditions such as the availability of financing for homebuyers and the inventory of distressed properties for sale.

Month	New Pending Sales	Percent Change Year-over-Year
Year-to-Date	1,042	1.8%
December 2025	**90**	**57.9%**
November 2025	91	24.7%
October 2025	78	5.4%
September 2025	80	6.7%
August 2025	87	27.9%
July 2025	76	40.7%
June 2025	75	-12.8%
May 2025	77	-24.5%
April 2025	89	-20.5%
March 2025	119	0.0%
February 2025	99	-3.9%
January 2025	81	-19.8%
December 2024	57	-21.9%

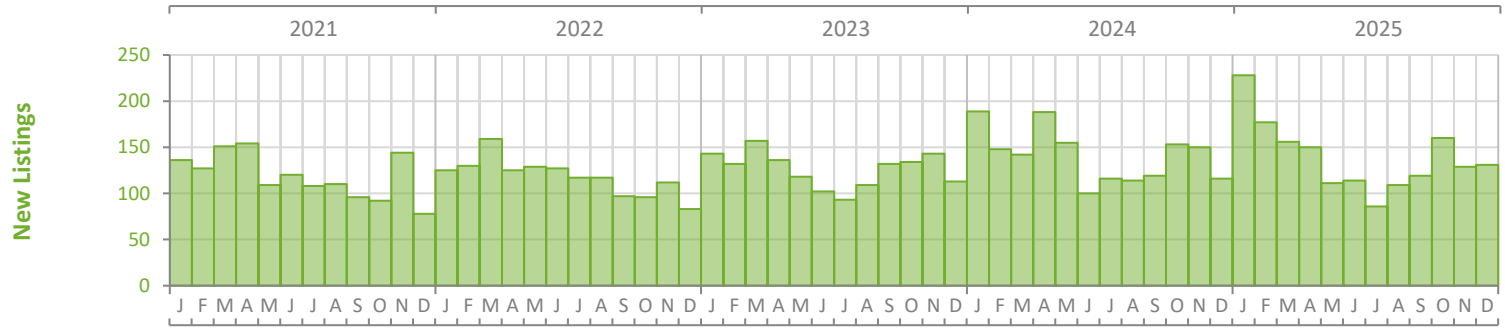


New Listings

The number of properties put onto the market during the month

Economists' note : New Listings tend to rise in delayed response to increasing prices, so they are often seen as a lagging indicator of market health. As prices rise, potential sellers raise their estimations of value—and in the most recent cycle, rising prices have freed up many potential sellers who were previously underwater on their mortgages. Note that in our calculations, we take care to not include properties that were recently taken off the market and quickly relisted, since these are not really *new* listings.

Month	New Listings	Percent Change Year-over-Year
Year-to-Date	1,670	-1.2%
December 2025	**131**	**12.9%**
November 2025	129	-14.0%
October 2025	160	4.6%
September 2025	119	0.0%
August 2025	109	-4.4%
July 2025	86	-25.9%
June 2025	114	14.0%
May 2025	111	-28.4%
April 2025	150	-20.2%
March 2025	156	9.9%
February 2025	177	19.6%
January 2025	228	20.6%
December 2024	116	2.7%



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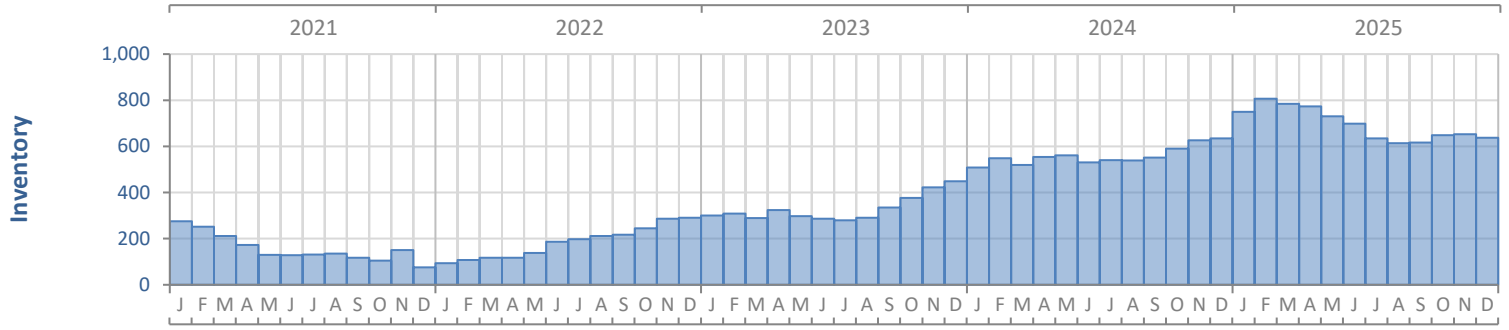
Inventory (Active Listings)

The number of property listings active at the end of the month

Economists' note : There are a number of ways to define and calculate Inventory. Our method is to simply count the number of active listings on the last day of the month, and hold this number to compare with the same month the following year. Inventory rises when New Listings are outpacing the number of listings that go off-market (regardless of whether they actually sell). Likewise, it falls when New Listings aren't keeping up with the rate at which homes are going off-market.

Month	Inventory	Percent Change Year-over-Year
YTD (Monthly Avg)	695	24.4%
December 2025	**637**	**0.3%**
November 2025	652	4.0%
October 2025	648	9.8%
September 2025	616	11.6%
August 2025	614	13.9%
July 2025	635	17.4%
June 2025	699	31.6%
May 2025	730	30.1%
April 2025	773	39.5%
March 2025	784	50.8%
February 2025	806	47.1%
January 2025	750	47.6%
December 2024	635	41.4%

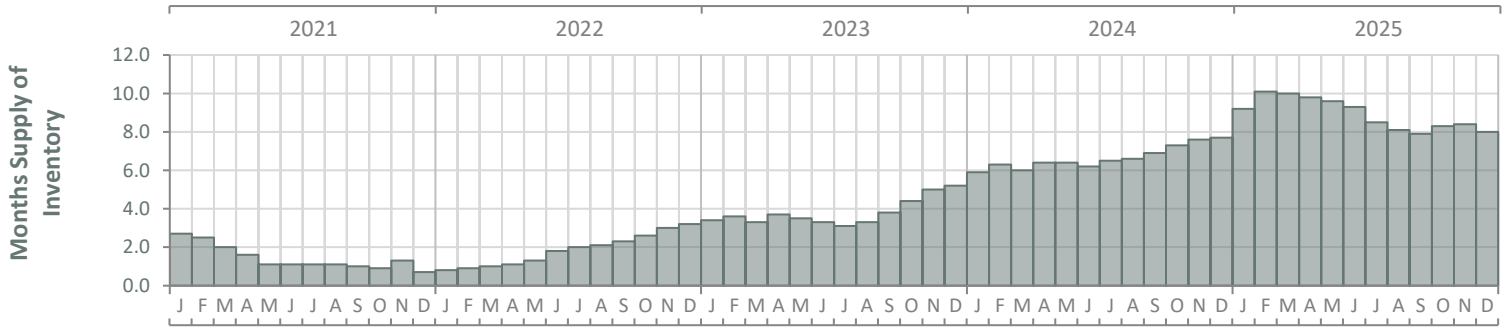


Months Supply of Inventory

An estimate of the number of months it will take to deplete the current Inventory given recent sales rates

Economists' note : MSI is a useful indicator of market conditions. The benchmark for a balanced market (favoring neither buyer nor seller) is 5.5 months of inventory. Anything higher is traditionally a buyers' market, and anything lower is a sellers' market. There is no single accepted way of calculating MSI. A common method is to divide current Inventory by the most recent month's Closed Sales count, but this count is a usually poor predictor of future Closed Sales due to seasonal cycles. To eliminate seasonal effects, we use the 12-month average of monthly Closed Sales instead.

Month	Months Supply	Percent Change Year-over-Year
YTD (Monthly Avg)	8.9	32.8%
December 2025	**8.0**	**3.9%**
November 2025	8.4	10.5%
October 2025	8.3	13.7%
September 2025	7.9	14.5%
August 2025	8.1	22.7%
July 2025	8.5	30.8%
June 2025	9.3	50.0%
May 2025	9.6	50.0%
April 2025	9.8	53.1%
March 2025	10.0	66.7%
February 2025	10.1	60.3%
January 2025	9.2	55.9%
December 2024	7.7	48.1%



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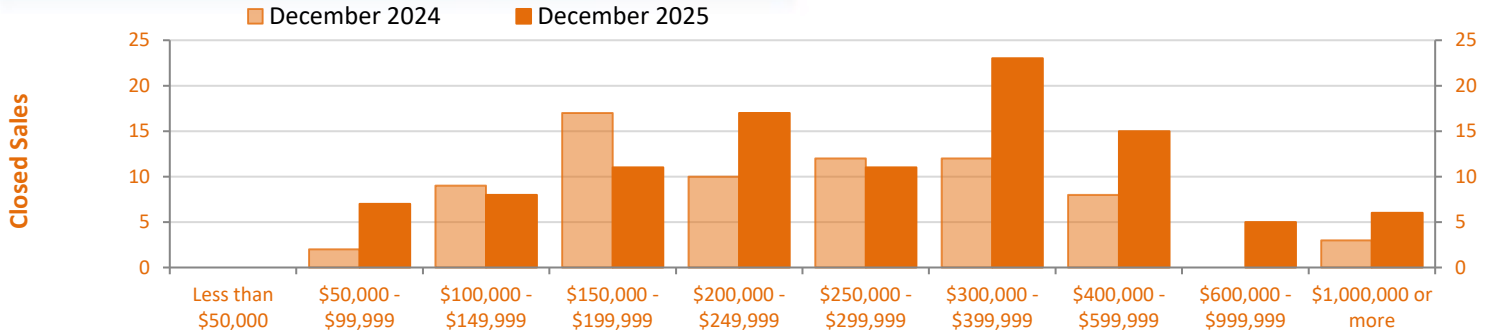
Closed Sales by Sale Price

The number of sales transactions which closed during the month

Economists' note: Closed Sales are one of the simplest—yet most important—indicators for the residential real estate market. When comparing Closed Sales across markets of different sizes, we recommend comparing the percent changes in sales rather than the number of sales. Closed Sales (and many other market metrics) are affected by seasonal cycles, so actual trends are more accurately represented by year-over-year changes (i.e. comparing a month's sales to the amount of sales in the same month in the previous year), rather than changes from one month to the next.

Sale Price	Closed Sales	Percent Change Year-over-Year
Less than $50,000	0	N/A
$50,000 - $99,999	7	250.0%
$100,000 - $149,999	8	-11.1%
$150,000 - $199,999	11	-35.3%
$200,000 - $249,999	17	70.0%
$250,000 - $299,999	11	-8.3%
$300,000 - $399,999	23	91.7%
$400,000 - $599,999	15	87.5%
$600,000 - $999,999	5	N/A
$1,000,000 or more	6	100.0%

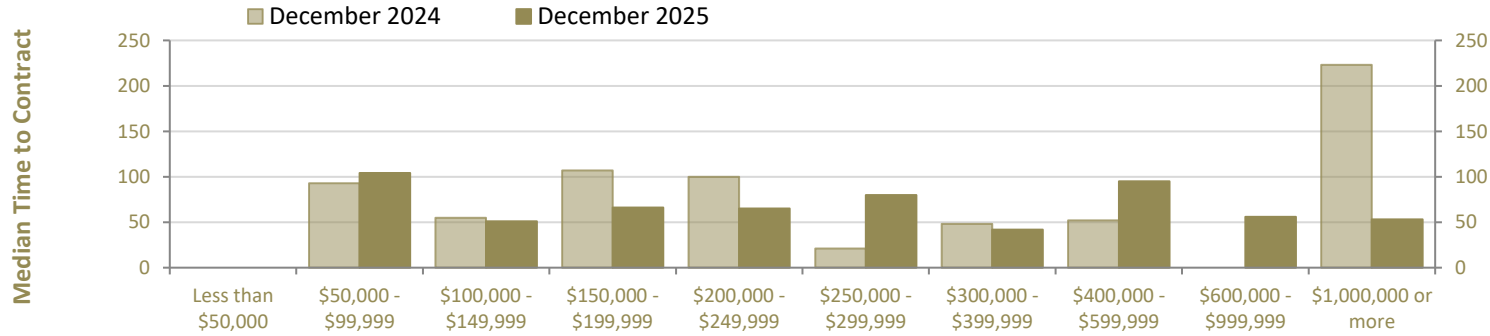


Median Time to Contract by Sale Price

The median number of days between the listing date and contract date for all Closed Sales during the month

Economists' note : Like Time to Sale, Time to Contract is a measure of the length of the home selling process calculated for sales which closed during the month. The difference is that Time to Contract measures the number of days between the initial listing of a property and the signing of the contract which eventually led to the closing of the sale. When the gap between Median Time to Contract and Median Time to Sale grows, it is usually a sign of longer closing times and/or declining numbers of cash sales.

Sale Price	Median Time to Contract	Percent Change Year-over-Year
Less than $50,000	(No Sales)	N/A
$50,000 - $99,999	104 Days	11.8%
$100,000 - $149,999	51 Days	-7.3%
$150,000 - $199,999	66 Days	-38.3%
$200,000 - $249,999	65 Days	-35.0%
$250,000 - $299,999	80 Days	281.0%
$300,000 - $399,999	42 Days	-12.5%
$400,000 - $599,999	95 Days	82.7%
$600,000 - $999,999	56 Days	N/A
$1,000,000 or more	53 Days	-76.2%



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Monthly Market Detail - December 2025
Townhouses and Condos
Martin County

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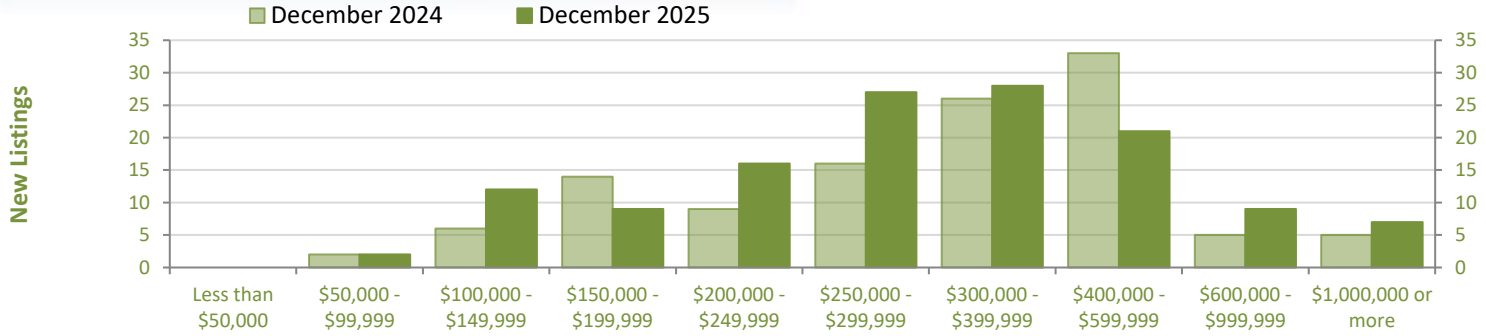
New Listings by Initial Listing Price

The number of properties put onto the market during the month

Economists' note: New Listings tend to rise in delayed response to increasing prices, so they are often seen as a lagging indicator of market health. As prices rise, potential sellers raise their estimations of value—and in the most recent cycle, rising prices have freed up many potential sellers who were previously underwater on their mortgages. Note that in our calculations, we take care to not include properties that were recently taken off the market and quickly relisted, since these are not really *new* listings.

Initial Listing Price	New Listings	Percent Change Year-over-Year
Less than $50,000	0	N/A
$50,000 - $99,999	2	0.0%
$100,000 - $149,999	12	100.0%
$150,000 - $199,999	9	-35.7%
$200,000 - $249,999	16	77.8%
$250,000 - $299,999	27	68.8%
$300,000 - $399,999	28	7.7%
$400,000 - $599,999	21	-36.4%
$600,000 - $999,999	9	80.0%
$1,000,000 or more	7	40.0%

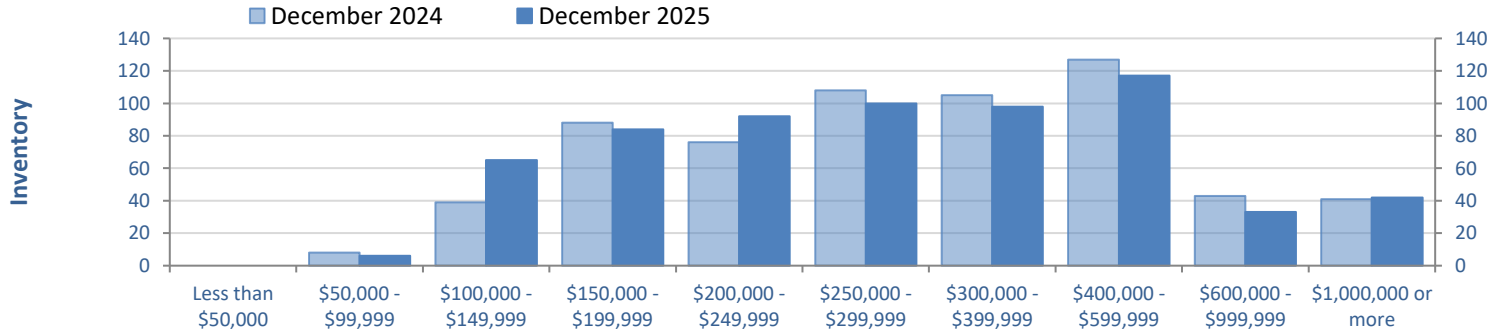


Inventory by Current Listing Price

The number of property listings active at the end of the month

Economists' note : There are a number of ways to define and calculate Inventory. Our method is to simply count the number of active listings on the last day of the month, and hold this number to compare with the same month the following year. Inventory rises when New Listings are outpacing the number of listings that go off-market (regardless of whether they actually sell). Likewise, it falls when New Listings aren't keeping up with the rate at which homes are going off-market.

Current Listing Price	Inventory	Percent Change Year-over-Year
Less than $50,000	0	N/A
$50,000 - $99,999	6	-25.0%
$100,000 - $149,999	65	66.7%
$150,000 - $199,999	84	-4.5%
$200,000 - $249,999	92	21.1%
$250,000 - $299,999	100	-7.4%
$300,000 - $399,999	98	-6.7%
$400,000 - $599,999	117	-7.9%
$600,000 - $999,999	33	-23.3%
$1,000,000 or more	42	2.4%



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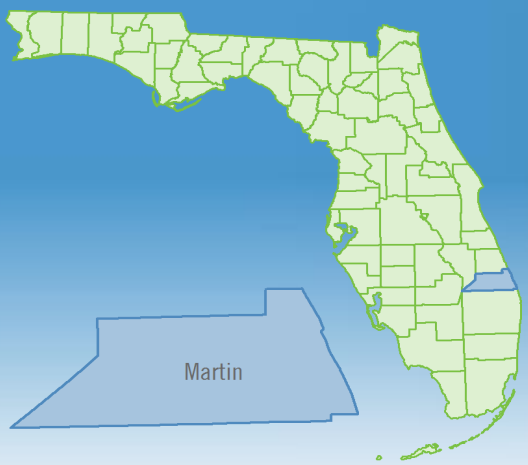
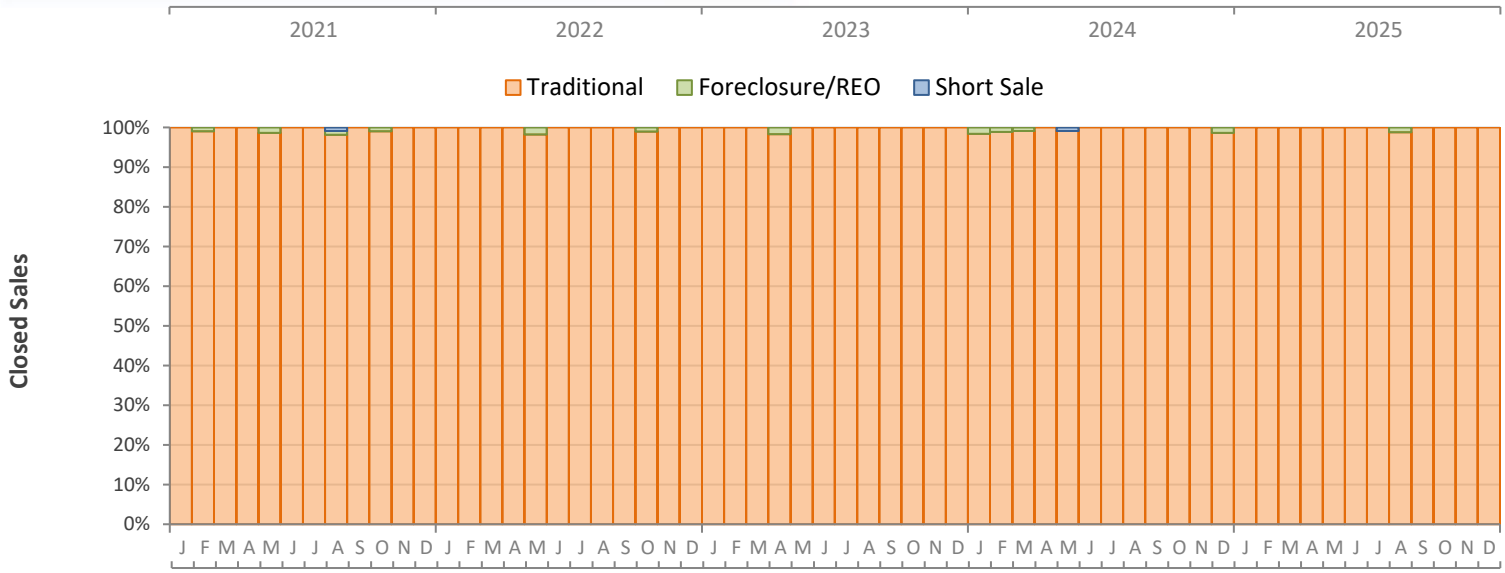
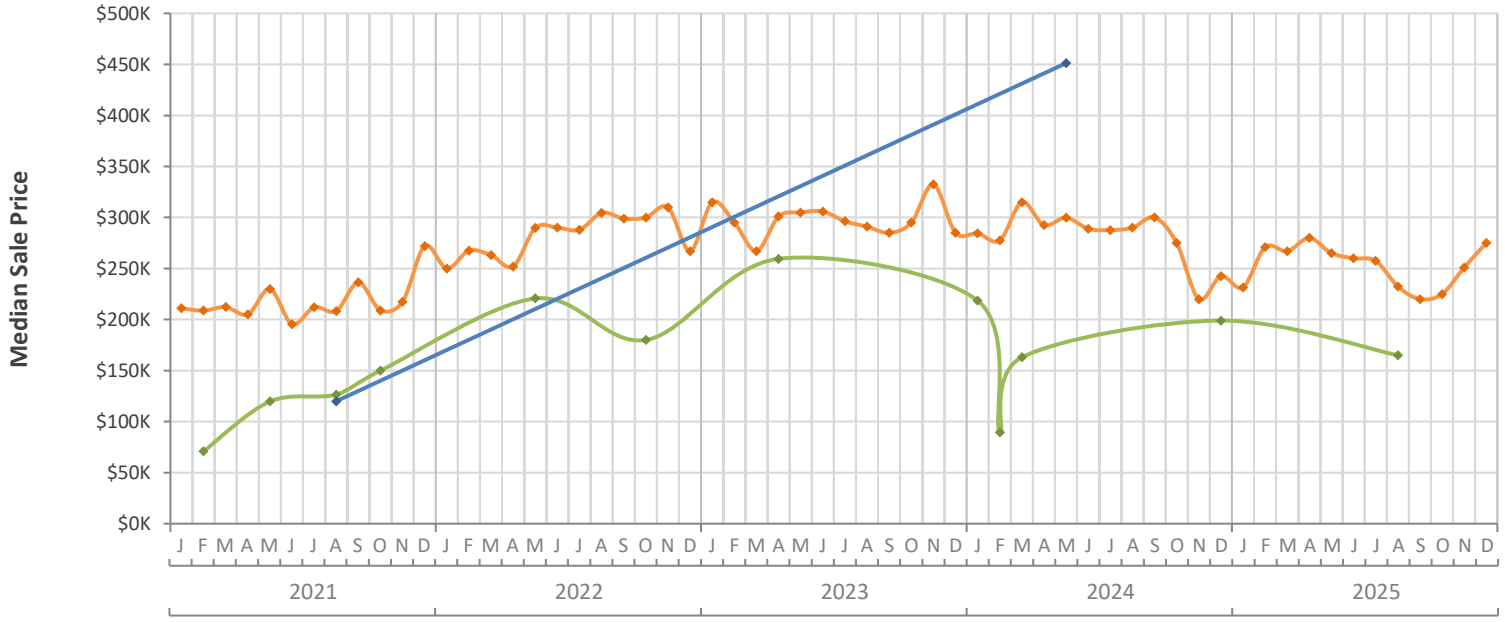
Monthly Distressed Market - December 2025
Townhouses and Condos
Martin County



		December 2025	December 2024	Percent Change Year-over-Year
Traditional	Closed Sales	103	72	43.1%
	Median Sale Price	$275,000	$242,500	13.4%
Foreclosure/REO	Closed Sales	0	1	-100.0%
	Median Sale Price	(No Sales)	$199,000	N/A
Short Sale	Closed Sales	0	0	N/A
	Median Sale Price	(No Sales)	(No Sales)	N/A





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