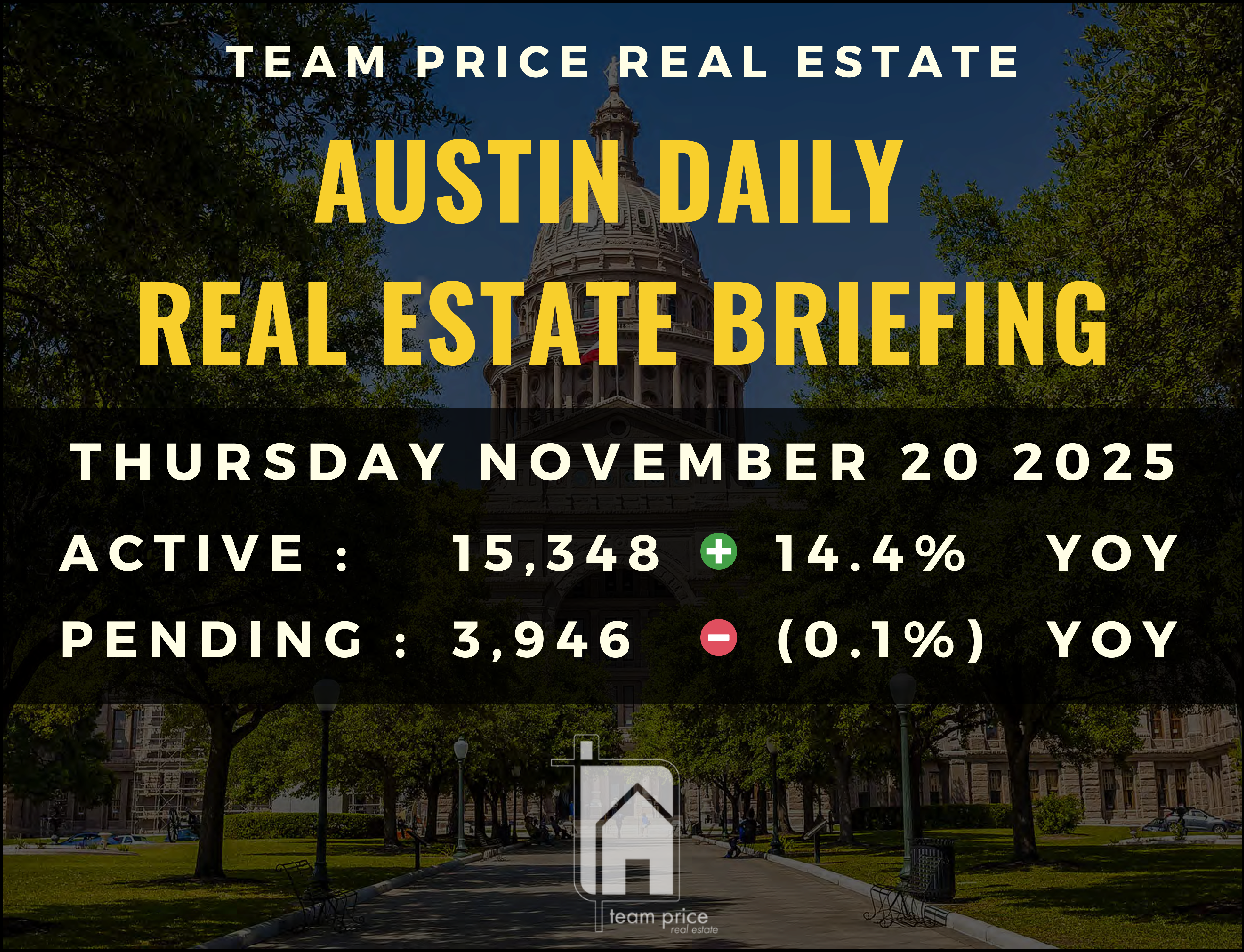
TEAM PRICE REAL ESTATE
AUSTIN DAILY
REAL ESTATE BRIEFING
THURSDAY NOVEMBER 20 2025
ACTIVE : 15,348 + 14.4% YOY
PENDING : 3,946 − (0.1%) YOY
team price
real estate

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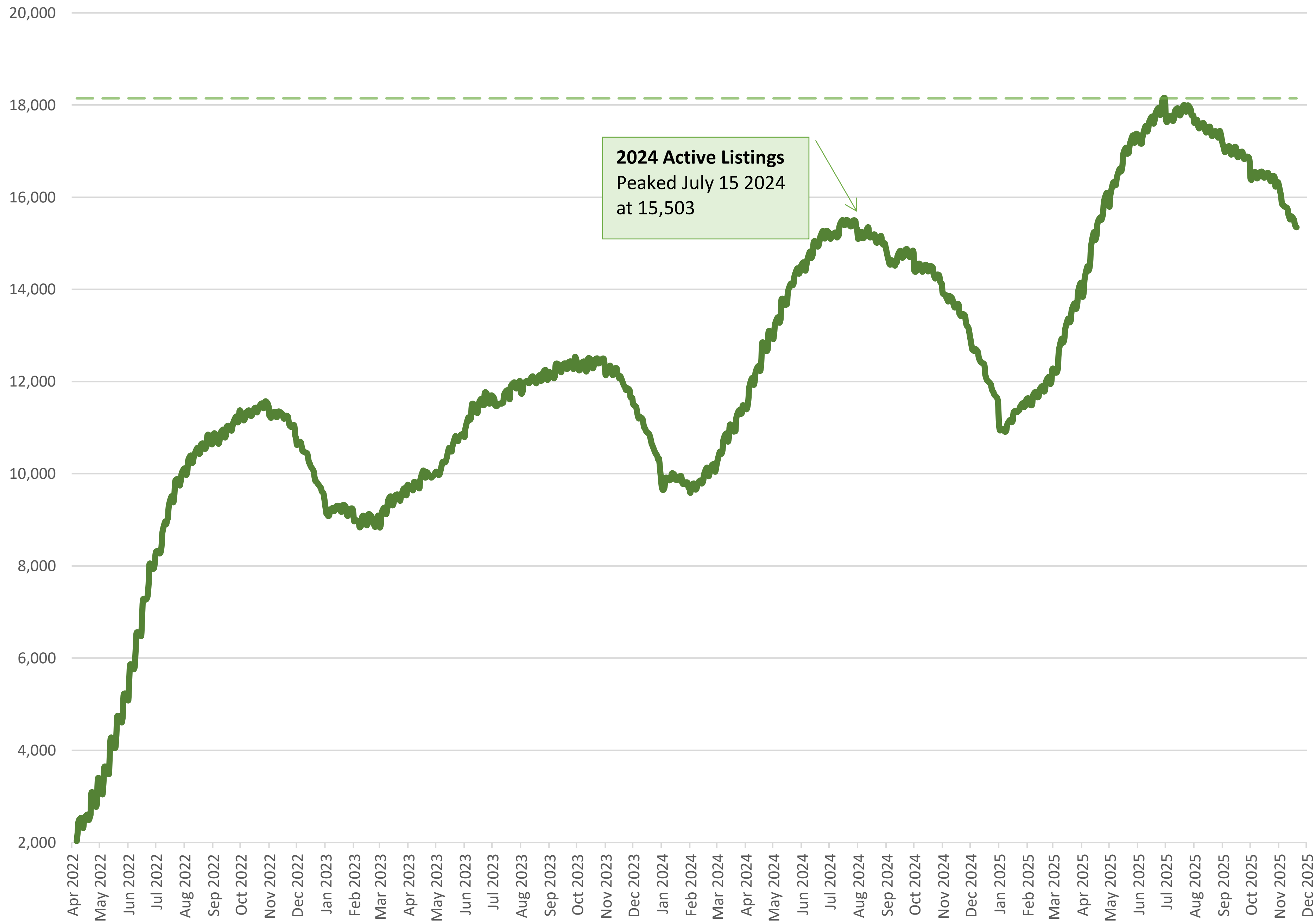
Active Residential Listings; Currently at 15,348 | Previous High of 18,146 on Mon, Jun 30, 2025 | -2,798



ALL Active Listings : Price Activity

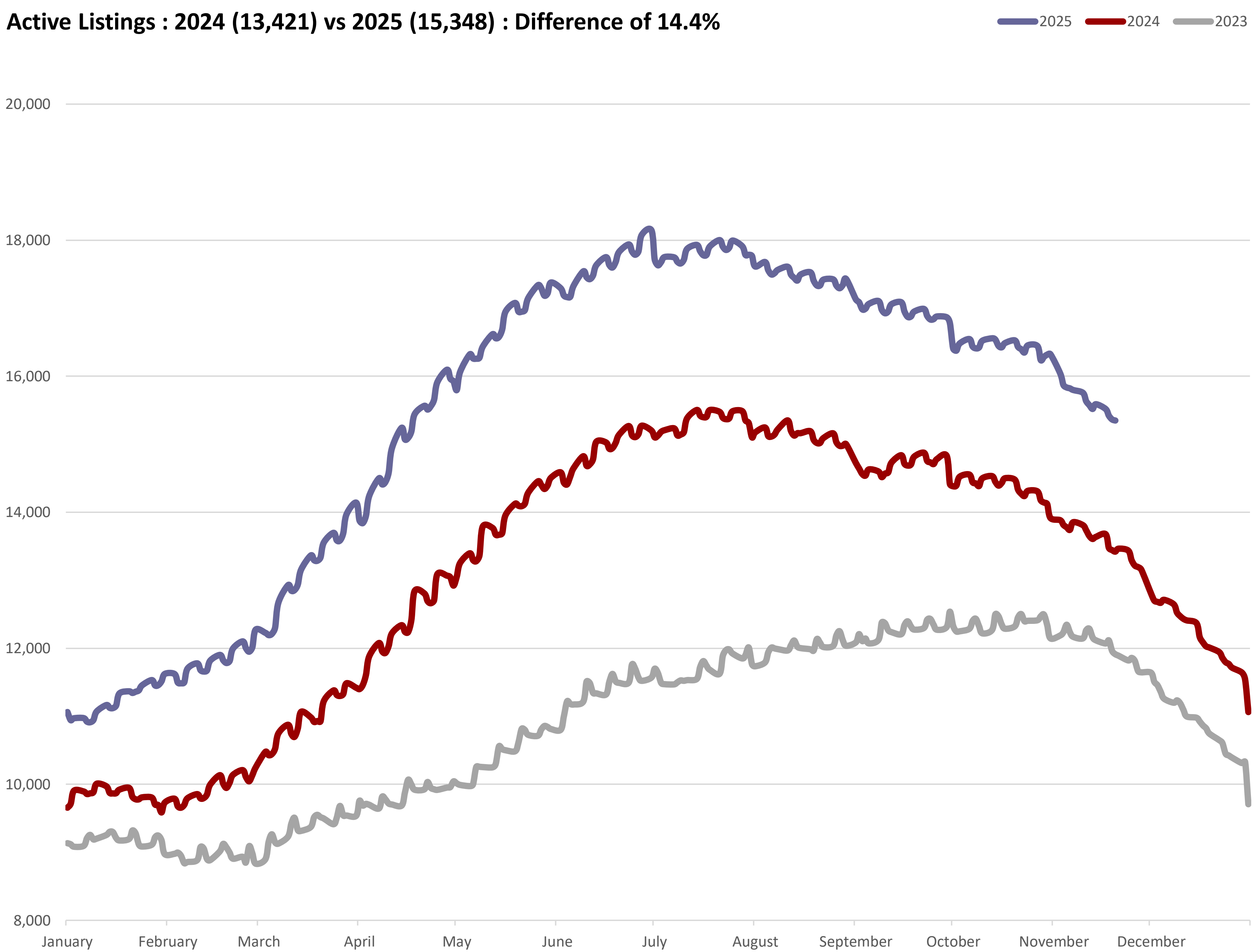
58.2% of All Active Listings have had at least 1 price drop

MLS	#	↓	↔	↑
Entire MLS	15,348	58.2%	38.8%	2.6%

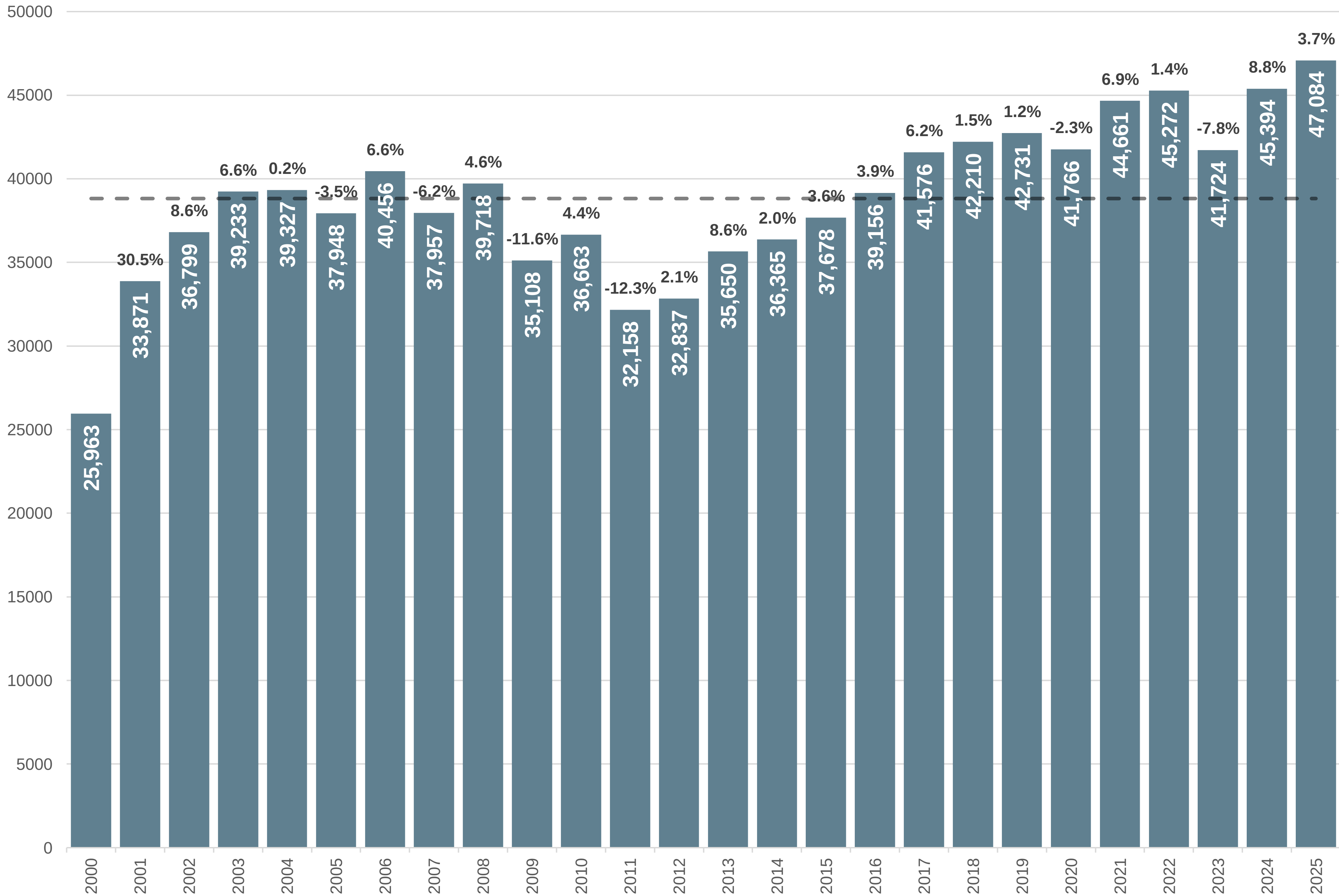
City	#	↓	↔	↑
Austin	659	56.4%	41.5%	1.4%
Bastrop	349	60.5%	38.1%	1.1%
Buda	313	51.8%	36.7%	11.5%
Burnet	154	53.2%	45.5%	1.3%
Cedar Creek	120	70.0%	29.2%	0.8%
Cedar Park	222	59.9%	37.8%	1.4%
Dale	66	53.0%	45.5%	1.5%
Del Valle	105	50.5%	42.9%	6.7%
Driftwood	34	64.7%	35.3%	
Dripping Springs	224	60.7%	37.5%	0.9%
Elgin	287	59.2%	38.7%	2.1%
Georgetown	1,179	63.9%	33.0%	3.1%
Hutto	339	64.3%	33.3%	2.4%
Jarrell	262	54.2%	42.4%	3.4%
Kyle	517	65.2%	28.6%	5.6%

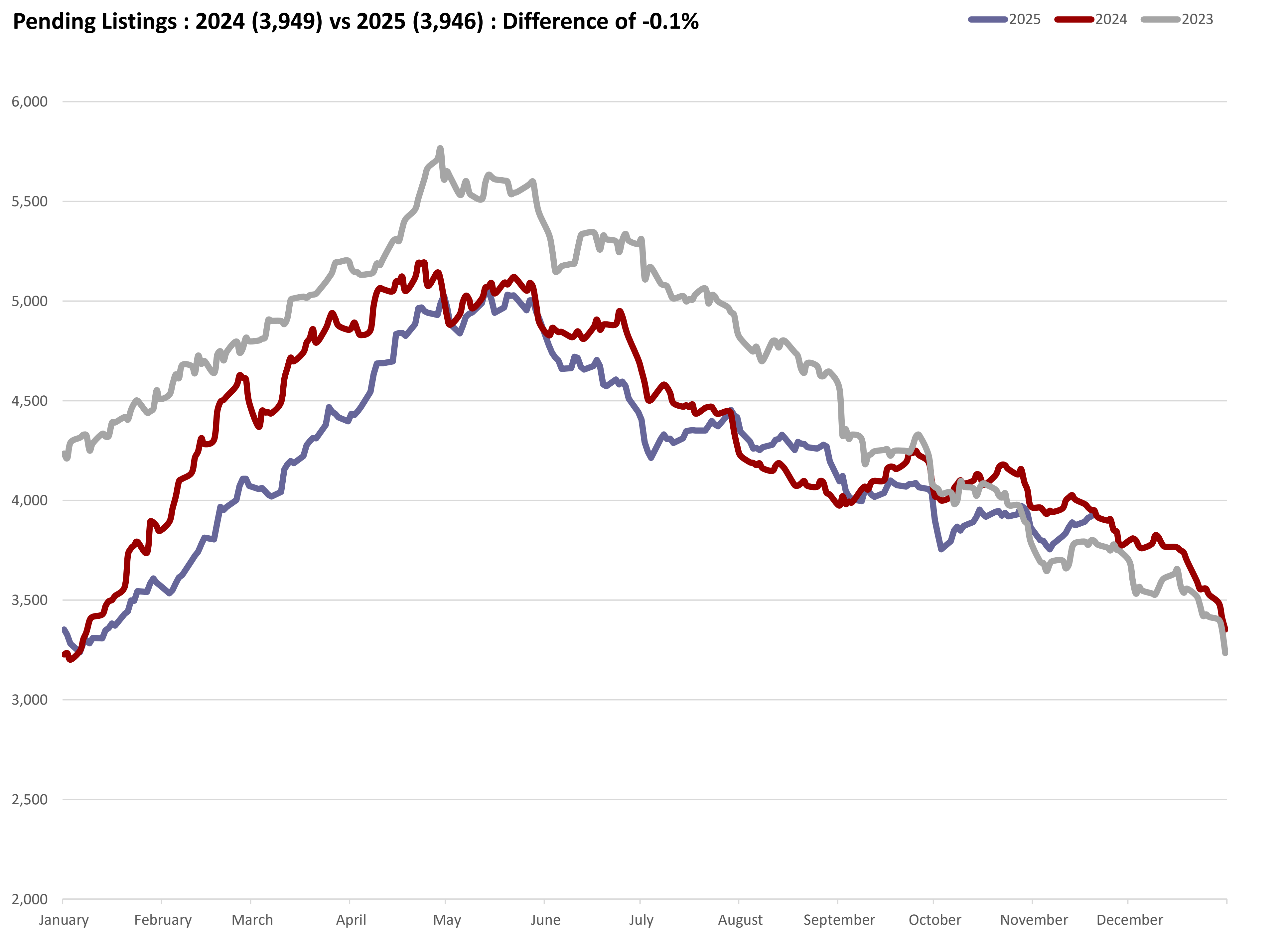
City	#	↓	↔	↑
Lago Vista	227	59.9%	38.8%	0.9%
Lakeway	126	62.7%	33.3%	0.8%
Leander	625	63.5%	33.3%	2.9%
Liberty Hill	438	67.1%	29.5%	3.2%
Lockhart	112	61.6%	33.9%	4.5%
Manchaca	15	60.0%	40.0%	
Manor	238	50.8%	46.2%	2.9%
Marble Falls	121	62.8%	32.2%	4.1%
Pflugerville	418	62.2%	35.2%	2.2%
Round Rock	611	61.5%	32.6%	5.2%
San Marcos	419	66.6%	30.3%	3.1%
Smithville	90	54.4%	43.3%	2.2%
Spicewood	266	52.6%	45.9%	1.1%
Taylor	113	53.1%	46.0%	0.9%
Wimberley	156	56.4%	42.3%	0.6%

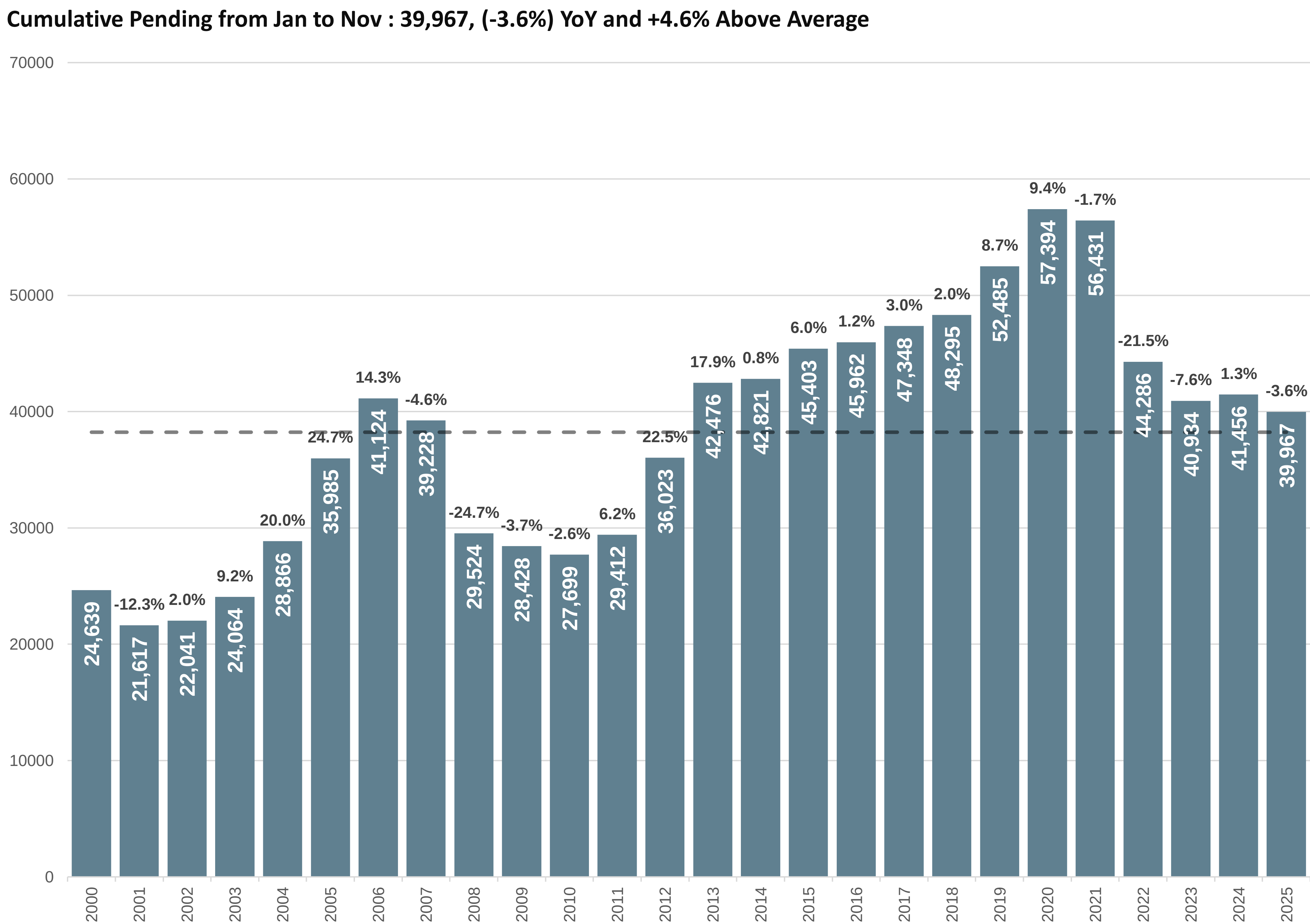
↓ : Price Drop **↔ : No Change** **↑ : Price Increase**

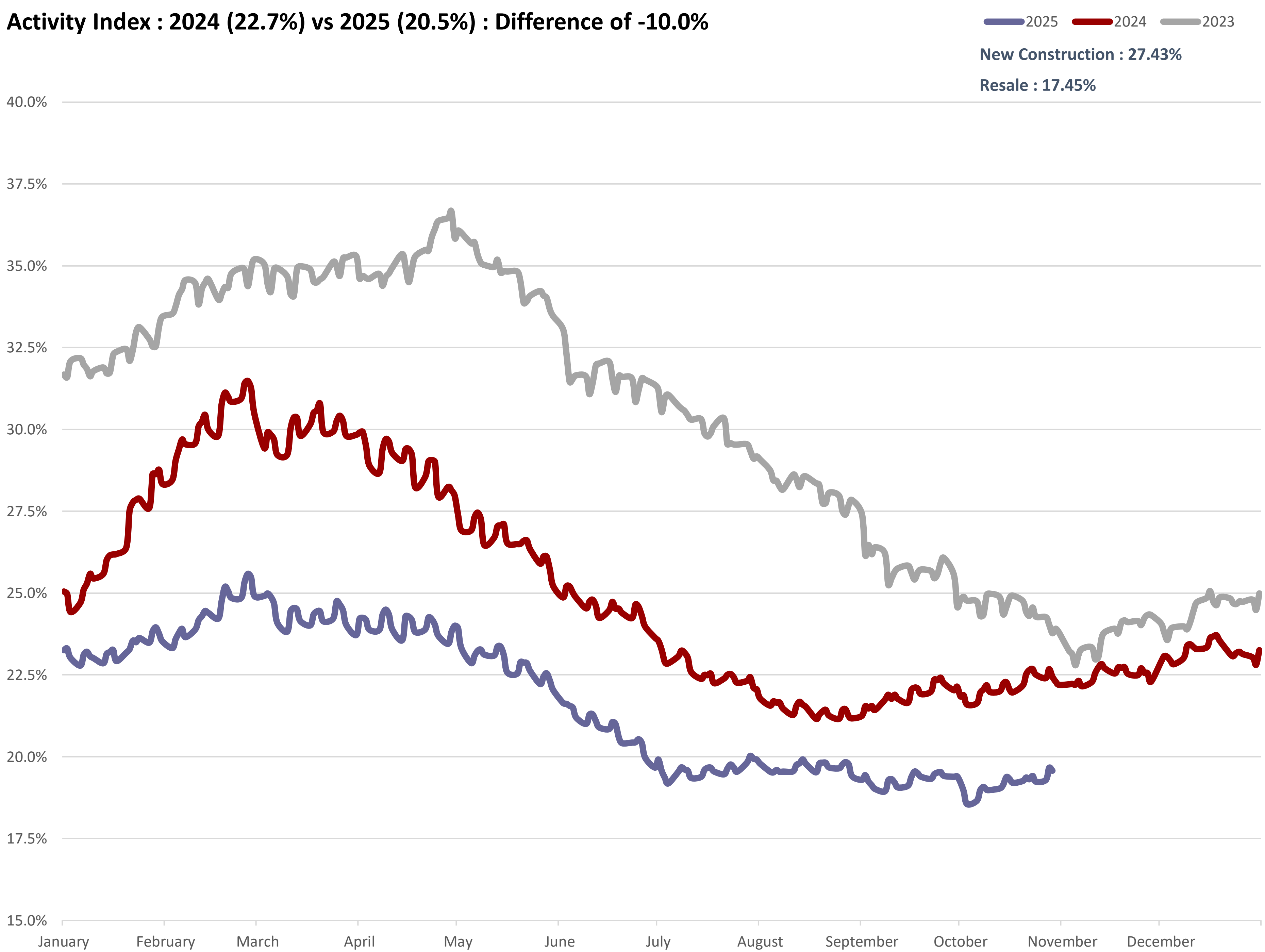

Active Listings : 2024 (13,421) vs 2025 (15,348) : Difference of 14.4%
2025
2024
2023
20,000
18,000
16,000
14,000
12,000
10,000
8,000
January
February
March
April
May
June
July
August
September
October
November
December

Cumulative New Listings from Jan to Nov : 47,084, +3.7% YoY and +21.3% Above Average




Pending Listings : 2024 (3,949) vs 2025 (3,946) : Difference of -0.1%
2025
2024
2023
6,000
5,500
5,000
4,500
4,000
3,500
3,000
2,500
2,000
January
February
March
April
May
June
July
August
September
October
November
December


Cumulative Pending from Jan to Nov : 39,967, (-3.6%) YoY and +4.6% Above Average
70000
60000
50000
40000
30000
20000
10000
0
24,639
-12.3%
21,617
2.0%
22,041
9.2%
24,064
20.0%
28,866
24.7%
35,985
14.3%
41,124
-4.6%
39,228
-24.7%
29,524
-3.7%
28,428
-2.6%
27,699
6.2%
29,412
22.5%
36,023
17.9%
42,476
0.8%
42,821
6.0%
45,403
1.2%
45,962
3.0%
47,348
2.0%
48,295
8.7%
52,485
9.4%
57,394
-1.7%
56,431
-21.5%
44,286
-7.6%
40,934
1.3%
41,456
-3.6%
39,967
2000
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025


Activity Index : 2024 (22.7%) vs 2025 (20.5%) : Difference of -10.0%
2025
2024
2023
New Construction : 27.43%
Resale : 17.45%
40.0%
37.5%
35.0%
32.5%
30.0%
27.5%
25.0%
22.5%
20.0%
17.5%
15.0%
January
February
March
April
May
June
July
August
September
October
November
December

Activity Index : Re-Sale : Market Phases Explained

		City		Zip		
Expansion	**> 30%**	**0**	**0%**	**6**	**8%**	**Strong demand, rising prices**
Equilibrium	**25% – 30%**	**1**	**3%**	**5**	**7%**	**Balanced conditions, steady absorption**
Softening	20% – 25%	3	10%	15	20%	Slower sales, rising inventory
Contraction / Danger Zone	**15% – 20%**	**16**	**53%**	**38**	**51%**	**Market stalls, supply imbalance, price decline**
Crisis / Freeze	**< 15%**	**10**	**33%**	**11**	**15%**	**Buyer paralysis, price corrections accelerate**

Top 30 Cities

Cedar Park	25.09%
Pflugerville	22.25%
Hutto	21.12%
Manchaca	21.05%
Kyle	19.62%
Austin	19.42%
Buda	19.10%
Georgetown	19.05%
Manor	18.88%
Liberty Hill	18.85%
Lockhart	18.68%
Round Rock	18.57%
Elgin	18.38%
Dripping Springs	18.18%
Lakeway	17.83%
Taylor	17.70%
Del Valle	17.11%
Wimberley	17.09%
Leander	16.83%
San Marcos	15.02%
Driftwood	13.16%
Jarrell	13.11%
Burnet	10.96%
Lago Vista	10.87%
Bastrop	10.55%
Cedar Creek	10.13%
Marble Falls	10.10%
Dale	8.93%
Spicewood	7.66%
Smithville	7.25%

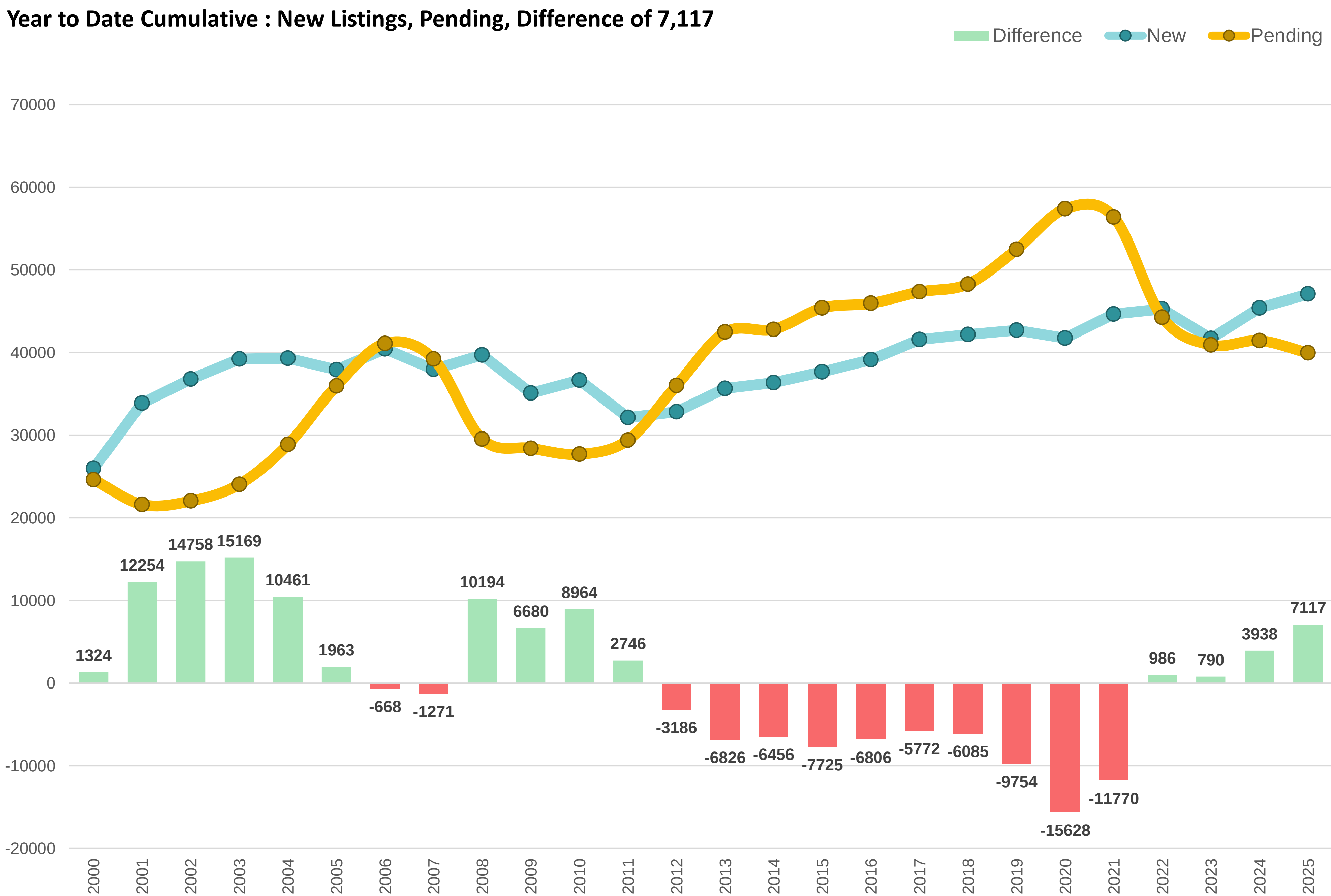
Top 75 Zip Codes

78728 | Austin	43.18%
78736 | Austin	32.50%
78733 | Austin	32.35%
78750 | Austin	31.31%
78749 | Austin	30.77%
78725 | Austin	30.61%
78739 | Austin	26.92%
78730 | Austin	26.56%
78726 | Austin	25.45%
78613 | Cedar Park	25.00%
78681 | Round Rock	25.00%
78729 | Austin	24.68%
78717 | Austin	24.44%
78722 | Austin	24.24%
78748 | Austin	24.12%
78759 | Austin	23.81%
78752 | Austin	23.33%
78745 | Austin	22.87%
78660 | Pflugerville	22.51%
78727 | Austin	21.79%
78738 | Austin	21.70%
78735 | Austin	21.54%
78634 | Hutto	21.46%
78633 | Georgetown	21.04%
78744 | Austin	20.93%
78703 | Austin	20.83%
78640 | Kyle	19.50%
78747 | Austin	19.15%
78737 | Austin	19.05%
78652 | Manchaca	19.05%
78653 | Manor	18.91%
78610 | Buda	18.81%
78723 | Austin	18.68%
78644 | Lockhart	18.68%
78642 | Liberty Hill	18.60%
78621 | Elgin	18.48%
78620 | Dripping Springs	18.38%
78756 | Austin	18.18%
76527 | Florence	18.18%
78746 | Austin	17.83%
78628 | Georgetown	17.83%
76574 | Taylor	17.70%
78626 | Georgetown	17.47%
78664 | Round Rock	17.37%
78705 | Austin	17.12%
78617 | Del Valle	17.11%
78641 | Leander	16.98%
78741 | Austin	16.80%
78676 | Wimberley	16.56%
78758 | Austin	16.41%
78724 | Austin	16.39%
78605 | Bertram	17.05%
78753 | Austin	17.01%
78704 | Austin	16.96%
78754 | Austin	16.67%
78666 | San Marcos	16.63%
78757 | Austin	16.31%
78702 | Austin	16.22%
78734 | Austin	16.20%
78751 | Austin	16.13%
78665 | Round Rock	15.79%
76537 | Jarrell	15.79%
78619 | Driftwood	15.69%
78731 | Austin	15.66%
78732 | Austin	14.13%
78645 | Lago Vista	14.09%
78611 | Burnet	12.82%
78616 | Dale	12.36%
78602 | Bastrop	11.49%
78612 | Cedar Creek	11.00%
78701 | Austin	9.33%
78654 | Marble Falls	9.09%
78721 | Austin	9.09%
78669 | Spicewood	7.82%
78957 | Smithville	7.22%

Monthly New Listing to Pending Ratio | Currently at 0.80

Monthly New Listing to Pending Ratio 0.80 Min 0.44 Max 1.34

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Min	Avg	Med	Max
2000	0.82	0.92	0.91	0.85	0.84	0.79	0.80	0.78	0.81	0.80	0.76	0.65	0.65	0.81	0.81	0.92
2001	0.62	0.61	0.61	0.61	0.54	0.57	0.55	0.56	0.45	0.51	0.63	0.68	0.45	0.58	0.59	0.68
2002	0.54	0.60	0.61	0.59	0.52	0.46	0.50	0.52	0.50	0.47	0.56	0.56	0.46	0.53	0.53	0.61
2003	0.45	0.51	0.48	0.51	0.54	0.59	0.57	0.55	0.52	0.69	0.56	0.57	0.45	0.54	0.54	0.69
2004	0.44	0.53	0.60	0.63	0.67	0.66	0.64	0.68	0.64	0.62	0.76	0.78	0.44	0.64	0.64	0.78
2005	0.58	0.71	0.73	0.72	0.79	0.80	0.80	0.86	0.85	0.83	0.82	0.84	0.58	0.78	0.80	0.86
2006	0.67	0.85	0.82	0.84	0.88	0.84	0.80	0.91	0.76	0.76	0.84	0.94	0.67	0.83	0.84	0.94
2007	0.76	0.85	0.80	0.81	1.25	1.26	0.80	0.64	0.63	0.85	1.05	0.81	0.63	0.88	0.81	1.26
2008	0.64	0.68	0.66	0.64	0.66	0.64	0.62	0.60	0.63	0.50	0.58	0.65	0.50	0.63	0.64	0.68
2009	0.54	0.58	0.62	0.68	0.76	0.71	0.69	0.75	0.75	0.73	0.60	0.66	0.54	0.67	0.68	0.76
2010	0.56	0.64	0.67	0.75	0.52	0.54	0.55	0.65	0.64	0.68	0.73	0.71	0.52	0.64	0.64	0.75
2011	0.64	0.73	0.66	0.69	0.77	0.75	0.80	0.82	0.81	0.79	0.87	0.93	0.64	0.77	0.78	0.93
2012	0.81	0.88	0.84	0.87	0.88	0.84	0.91	0.90	0.93	0.94	0.98	1.12	0.81	0.91	0.89	1.12
2013	0.98	0.99	0.97	0.98	0.91	0.93	0.94	0.91	0.96	0.97	1.04	1.08	0.91	0.97	0.97	1.08
2014	0.97	1.02	1.01	1.00	0.90	0.91	0.86	0.88	0.98	0.93	1.06	1.16	0.86	0.97	0.98	1.16
2015	0.99	1.05	1.02	0.94	0.95	0.94	0.87	0.97	0.99	0.99	1.09	1.12	0.87	0.99	0.99	1.12
2016	1.03	0.96	0.92	0.98	1.01	0.86	0.89	0.93	0.90	1.04	1.11	1.07	0.86	0.98	0.97	1.11
2017	1.00	0.97	0.88	0.91	0.91	0.86	0.89	0.88	0.94	0.98	1.04	1.20	0.86	0.95	0.92	1.20
2018	1.05	0.99	0.90	0.93	0.90	0.87	0.92	0.83	0.91	0.93	0.97	1.13	0.83	0.94	0.92	1.13
2019	0.95	1.00	1.01	1.02	0.92	0.97	0.98	0.96	1.03	1.05	1.12	1.22	0.92	1.02	1.00	1.22
2020	1.08	1.12	0.86	0.83	1.08	1.19	1.02	1.26	1.18	1.12	1.29	1.34	0.83	1.11	1.12	1.34
2021	1.24	1.12	1.16	1.01	1.14	0.99	0.89	1.05	1.00	1.12	1.25	1.29	0.89	1.11	1.12	1.29
2022	1.32	1.15	1.02	0.90	0.83	0.58	0.63	0.76	0.66	0.71	0.85	1.03	0.58	0.87	0.84	1.32
2023	0.88	0.95	0.79	0.91	0.81	0.77	0.83	0.74	0.71	0.77	0.82	1.08	0.71	0.84	0.81	1.08
2024	0.89	0.81	0.76	0.72	0.67	0.71	0.77	0.75	0.80	0.79	0.94	1.03	0.67	0.80	0.78	1.03
2025	0.69	0.75	0.71	0.65	0.64	0.72	0.75	0.80	0.79	0.77	0.80		0.64	0.73	0.75	0.80

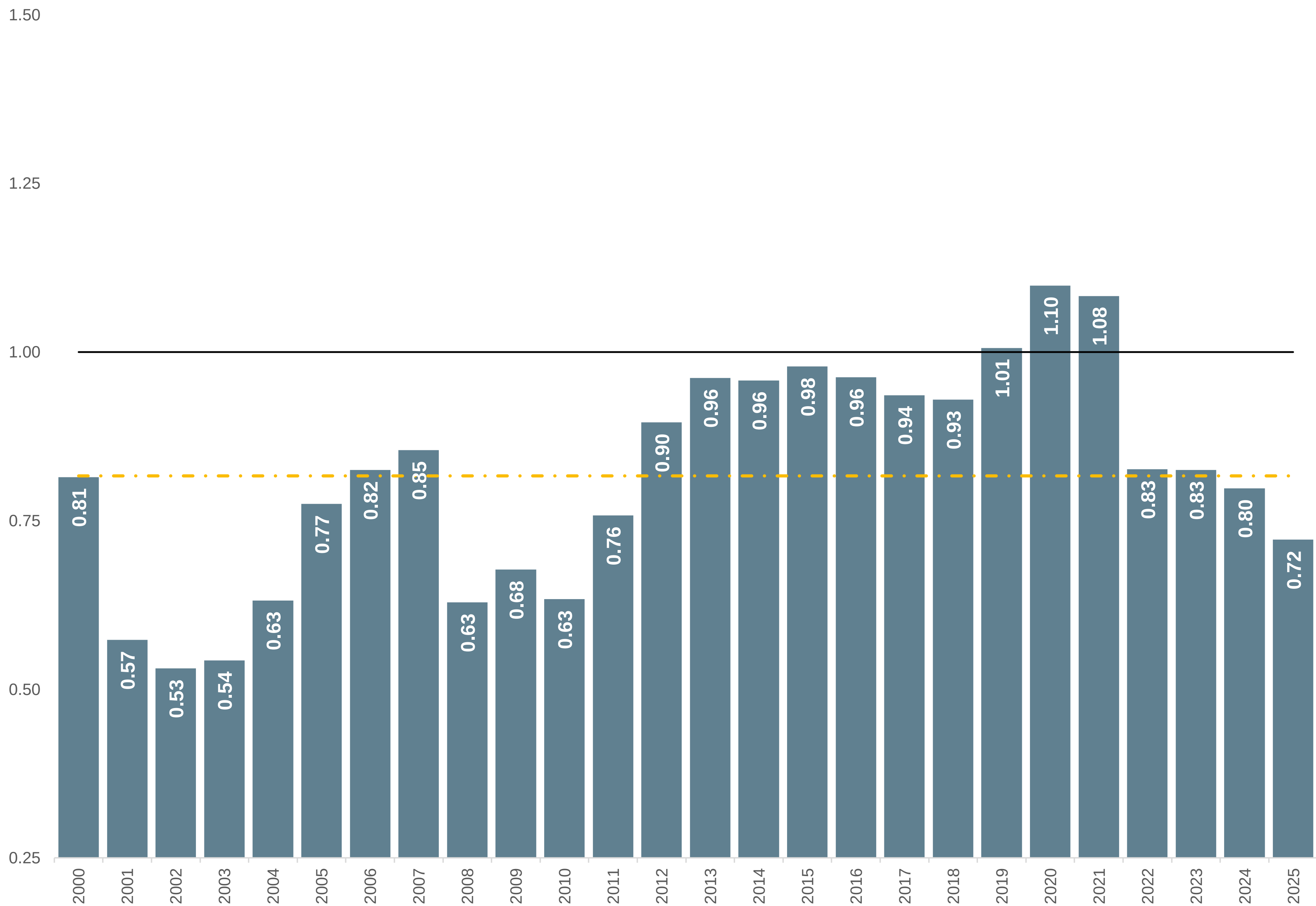


Year to Date Cumulative : New Listings, Pending, Difference of 7,117
Difference
New
Pending
70000
60000
50000
40000
30000
20000
10000
0
-10000
-20000
1324
12254
14758
15169
10461
1963
-668
-1271
10194
6680
8964
2746
-3186
-6826
-6456
-7725
-6806
-5772
-6085
-9754
-15628
-11770
986
790
3938
7117
2000
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025

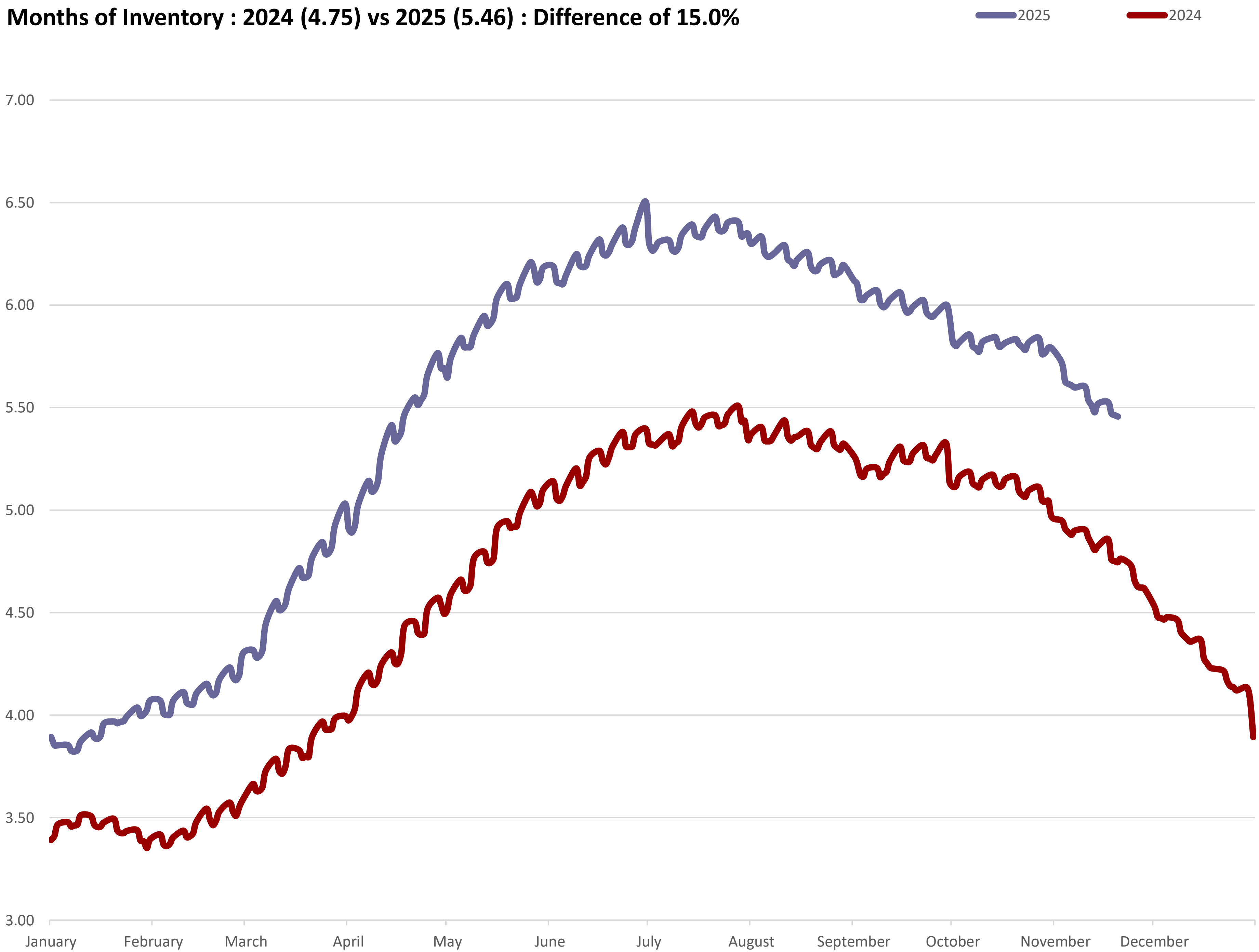
Residential - Year

Year	New	BOM	%	AUC	PB	Total	PB%	Ratio	Diff	Sold	With	Expired
2000	27,568	4,173	15%	13,696	12,159	25,855	47%	0.81	5,886	18,697	3,647	3,022
2001	35,516	4,524	13%	13,768	9,185	22,953	40%	0.57	17,087	18,282	7,667	6,422
2002	38,894	5,130	13%	14,702	8,679	23,381	37%	0.53	20,643	18,592	9,277	8,790
2003	41,625	5,612	13%	15,148	10,494	25,642	41%	0.54	21,595	19,667	10,633	9,305
2004	41,355	7,637	18%	18,002	12,948	30,950	42%	0.63	18,042	22,482	9,014	10,498
2005	40,080	9,338	23%	23,343	14,941	38,284	39%	0.77	11,134	26,665	7,401	7,321
2006	42,539	10,542	25%	26,644	17,143	43,787	39%	0.82	9,294	29,968	6,971	5,532
2007	39,899	8,282	21%	24,028	17,140	41,168	42%	0.85	7,013	27,690	8,106	6,845
2008	41,596	7,729	19%	19,224	11,793	31,017	38%	0.63	18,308	22,099	11,182	9,129
2009	37,047	7,238	20%	19,217	10,779	29,996	36%	0.68	14,289	20,560	10,647	7,031
2010	38,413	7,793	20%	18,396	10,872	29,268	37%	0.63	16,938	19,734	11,807	7,421
2011	33,694	7,606	23%	19,061	12,229	31,290	39%	0.76	10,010	21,054	9,234	5,478
2012	34,340	8,385	24%	25,147	13,117	38,264	34%	0.90	4,461	25,291	6,857	3,897
2013	37,147	9,215	25%	29,654	14,931	44,585	33%	0.96	1,777	30,011	5,245	3,204
2014	37,969	9,327	25%	30,468	14,837	45,305	33%	0.96	1,991	30,280	5,126	2,489
2015	39,373	9,586	24%	31,749	16,154	47,903	34%	0.98	1,056	31,451	5,307	2,712
2016	40,974	9,418	23%	31,855	16,650	48,505	34%	0.96	1,887	32,771	5,614	2,816
2017	43,484	10,267	24%	32,458	17,860	50,318	35%	0.94	3,433	34,028	6,191	3,521
2018	44,091	10,947	25%	32,283	18,873	51,156	37%	0.93	3,882	34,968	6,097	3,526
2019	44,717	10,627	24%	33,296	22,392	55,688	40%	1.01	-344	37,487	5,223	3,216
2020	44,221	11,701	26%	34,241	27,191	61,432	44%	1.10	-5,510	40,688	3,624	2,223
2021	46,830	8,582	18%	31,860	28,166	60,026	47%	1.08	-4,614	41,755	3,216	990
2022	47,122	9,587	20%	24,023	22,830	46,853	49%	0.83	9,856	34,319	6,947	2,684
2023	43,740	9,256	21%	21,467	22,256	43,723	51%	0.83	9,273	31,006	8,642	4,545
2024	47,547	7,813	16%	21,973	22,211	44,184	50%	0.80	11,176	31,380	9,048	6,239
2025	47,084	8,288	18%	20,843	19,124	39,967	48%	0.72	15,405	26,723	9,507	5,931

New Listing to Pending Ratio for the Year 0.72 | 25 Year Average is 0.82



Months of Inventory : 2024 (4.75) vs 2025 (5.46) : Difference of 15.0%



Months of Inventory : Re-Sale ONLY : Market Type Explained

			City		Zip		
Seller Acceleration	**< 4.0**	**< 120 days**	**3**	**10%**	**17**	**23%**	**Fast sales, rising prices**
Seller Edge	**4.0 – 4.9**	**120–147 days**	**4**	**13%**	**12**	**16%**	**Tight supply, upward pressure**
Neutral Zone	5.0 – 6.9	150–207 days	8	27%	21	28%	Balanced conditions, stable pricing
Buyer Advantage	**7.0 – 8.9**	**210–267 days**	**10**	**33%**	**13**	**17%**	**Rising inventory, buyer leverage**
Buyer Control	**9.0+**	**270+ days**	**5**	**17%**	**12**	**16%**	**Excess supply, declining prices**

Top 30 Cities	
Cedar Park	2.82
Manchaca	3.00
Round Rock	3.91
Pflugerville	4.09
Buda	4.64
Dripping Springs	4.78
Driftwood	4.95
Georgetown	5.02
Austin	5.03
Lakeway	5.13
Lockhart	5.41
Hutto	5.60
Leander	5.63
Kyle	5.91
Liberty Hill	6.60
Taylor	7.15
San Marcos	7.25
Manor	7.34
Bastrop	7.63
Wimberley	7.71
Jarrell	7.76
Del Valle	8.22
Lago Vista	8.34
Marble Falls	8.61
Cedar Creek	8.88
Burnet	10.54
Elgin	10.79
Smithville	16.00
Dale	19.13
Spicewood	19.15

Top 75 Zip Codes					
78739 | Austin	1.84	78736 | Austin	4.76	78753 | Austin	7.11
78749 | Austin	2.08	78735 | Austin	4.78	76574 | Taylor	7.15
78728 | Austin	2.21	78628 | Georgetown	4.84	78666 | San Marcos	7.18
78750 | Austin	2.68	78619 | Driftwood	4.95	78653 | Manor	7.52
78727 | Austin	2.69	78703 | Austin	5.00	78721 | Austin	7.60
78613 | Cedar Park	2.78	78754 | Austin	5.00	78724 | Austin	7.65
78748 | Austin	3.15	78746 | Austin	5.16	78734 | Austin	7.66
78729 | Austin	3.16	78756 | Austin	5.40	78602 | Bastrop	7.67
78652 | Manchaca	3.19	78644 | Lockhart	5.41	76537 | Jarrell	7.68
78681 | Round Rock	3.33	78758 | Austin	5.44	78676 | Wimberley	7.86
78733 | Austin	3.63	78732 | Austin	5.56	78741 | Austin	8.00
78738 | Austin	3.69	78747 | Austin	5.56	78617 | Del Valle	8.22
78665 | Round Rock	3.77	78634 | Hutto	5.60	78612 | Cedar Creek	8.88
78717 | Austin	3.78	78641 | Leander	5.61	78645 | Lago Vista	9.36
78731 | Austin	3.85	78730 | Austin	5.88	78605 | Bertram	9.46
78757 | Austin	3.94	78745 | Austin	5.95	78654 | Marble Falls	9.48
78759 | Austin	3.95	78640 | Kyle	5.95	78702 | Austin	9.98
78744 | Austin	4.03	78704 | Austin	5.98	78705 | Austin	10.22
78660 | Pflugerville	4.05	78626 | Georgetown	6.10	78611 | Burnet	10.54
78725 | Austin	4.25	78722 | Austin	6.25	78621 | Elgin	10.71
78737 | Austin	4.40	78752 | Austin	6.27	76527 | Florence	13.50
78610 | Buda	4.60	78751 | Austin	6.43	78701 | Austin	13.71
78633 | Georgetown	4.67	78642 | Liberty Hill	6.57	78957 | Smithville	16.00
78620 | Dripping Springs	4.72	78723 | Austin	6.73	78669 | Spicewood	18.94
78664 | Round Rock	4.76	78726 | Austin	6.83	78616 | Dale	19.13

Months of Inventory Table : Inventory and % Difference

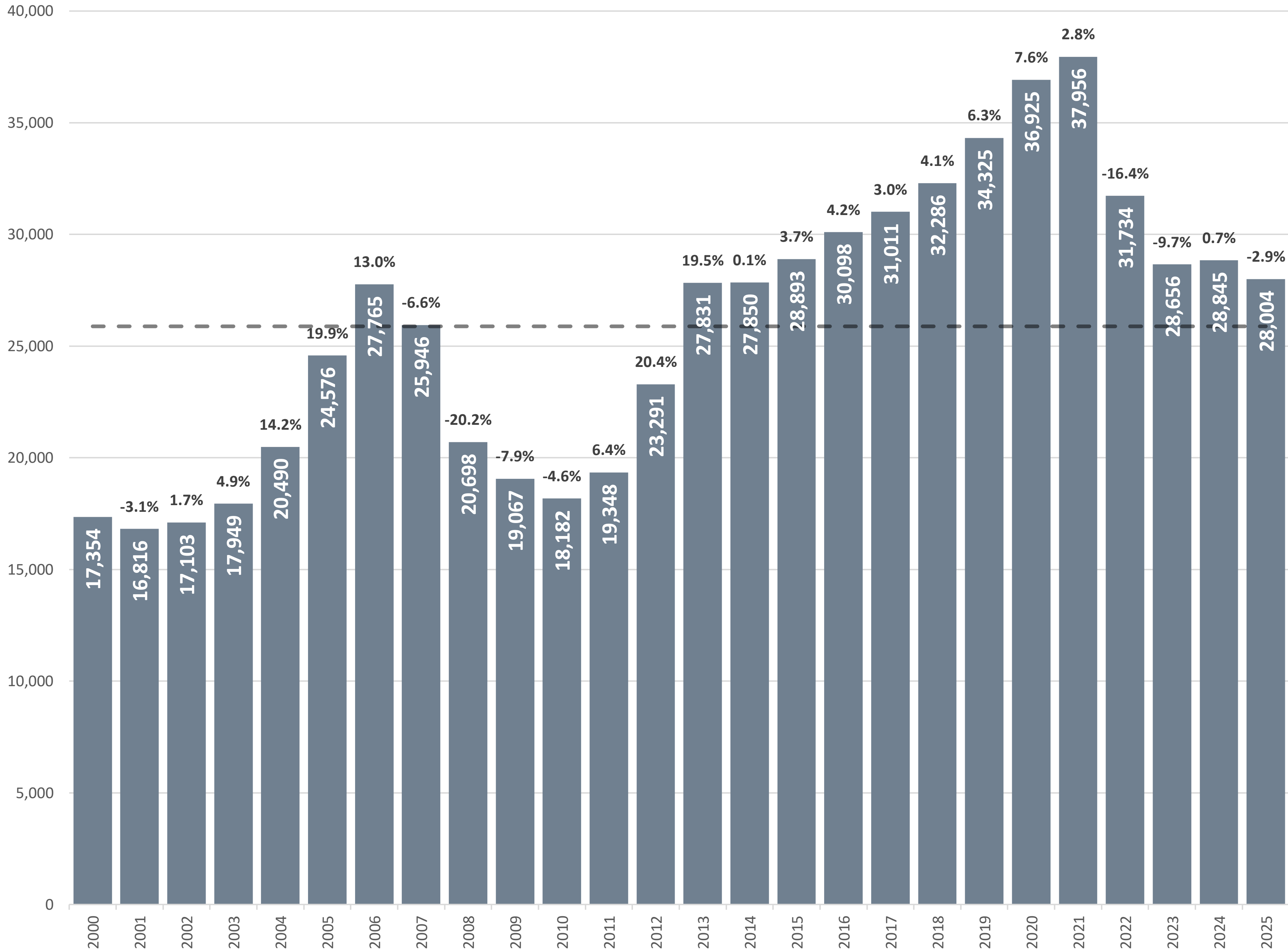
YoY: Nov 2024 to Nov 2025			
City	Nov 2024	Nov 2025	% Diff
Del Valle	2.79	5.25	87.9%
Hutto	2.87	5.38	87.2%
Lockhart	2.49	4.54	82.4%
Marble Falls	4.85	8.25	70.0%
Jarrell	2.92	4.79	64.0%
Georgetown	3.46	4.95	43.0%
Pflugerville	2.96	4.22	42.9%
Leander	3.56	5.07	42.4%
San Marcos	5.30	7.53	42.0%
Elgin	5.34	7.49	40.3%
Kyle	3.42	4.66	36.2%
Smithville	8.70	11.00	26.4%
Buda	3.39	4.23	24.8%
Manor	4.14	5.03	21.6%
Bastrop	5.88	6.71	14.1%
Liberty Hill	4.91	5.59	13.8%
Round Rock	3.68	4.06	10.4%
Austin	4.84	5.03	3.9%
Burnet	11.00	11.00	0.0%
Dale	11.00	11.00	0.0%
Spicewood	11.00	11.00	0.0%
Wimberley	8.21	8.21	0.0%
Cedar Park	2.84	2.83	-0.2%
Lakeway	5.26	5.11	-2.9%
Taylor	6.29	6.05	-3.8%
Cedar Creek	6.24	5.90	-5.4%
Dripping Springs	4.98	4.23	-15.2%
Lago Vista	10.20	8.30	-18.6%
Driftwood	6.35	4.25	-33.1%
Manchaca	6.30	2.50	-60.3%

YTD: Jan 2025 to Nov 2025			
City	Jan 2025	Nov 2025	% Diff
Marble Falls	4.98	8.25	65.5%
Leander	3.32	5.07	52.8%
Smithville	7.27	11.00	51.3%
Cedar Park	1.93	2.83	46.5%
Burnet	7.65	11.00	43.8%
Round Rock	2.86	4.06	42.3%
San Marcos	5.36	7.53	40.3%
Cedar Creek	4.31	5.90	36.8%
Pflugerville	3.12	4.22	35.4%
Manor	3.85	5.03	30.6%
Georgetown	3.82	4.95	29.8%
Elgin	5.82	7.49	28.6%
Jarrell	3.74	4.79	28.3%
Kyle	3.67	4.66	27.0%
Liberty Hill	4.44	5.59	25.8%
Bastrop	5.60	6.71	19.9%
Wimberley	7.11	8.21	15.6%
Austin	4.36	5.03	15.5%
Dripping Springs	3.78	4.23	11.9%
Hutto	4.90	5.38	9.8%
Lockhart	4.15	4.54	9.4%
Buda	3.93	4.23	7.6%
Del Valle	4.98	5.25	5.4%
Taylor	5.93	6.05	2.0%
Dale	11.00	11.00	0.0%
Spicewood	11.00	11.00	0.0%
Lakeway	5.43	5.11	-6.0%
Lago Vista	10.50	8.30	-20.9%
Driftwood	5.60	4.25	-24.1%
Manchaca	5.63	2.50	-55.6%

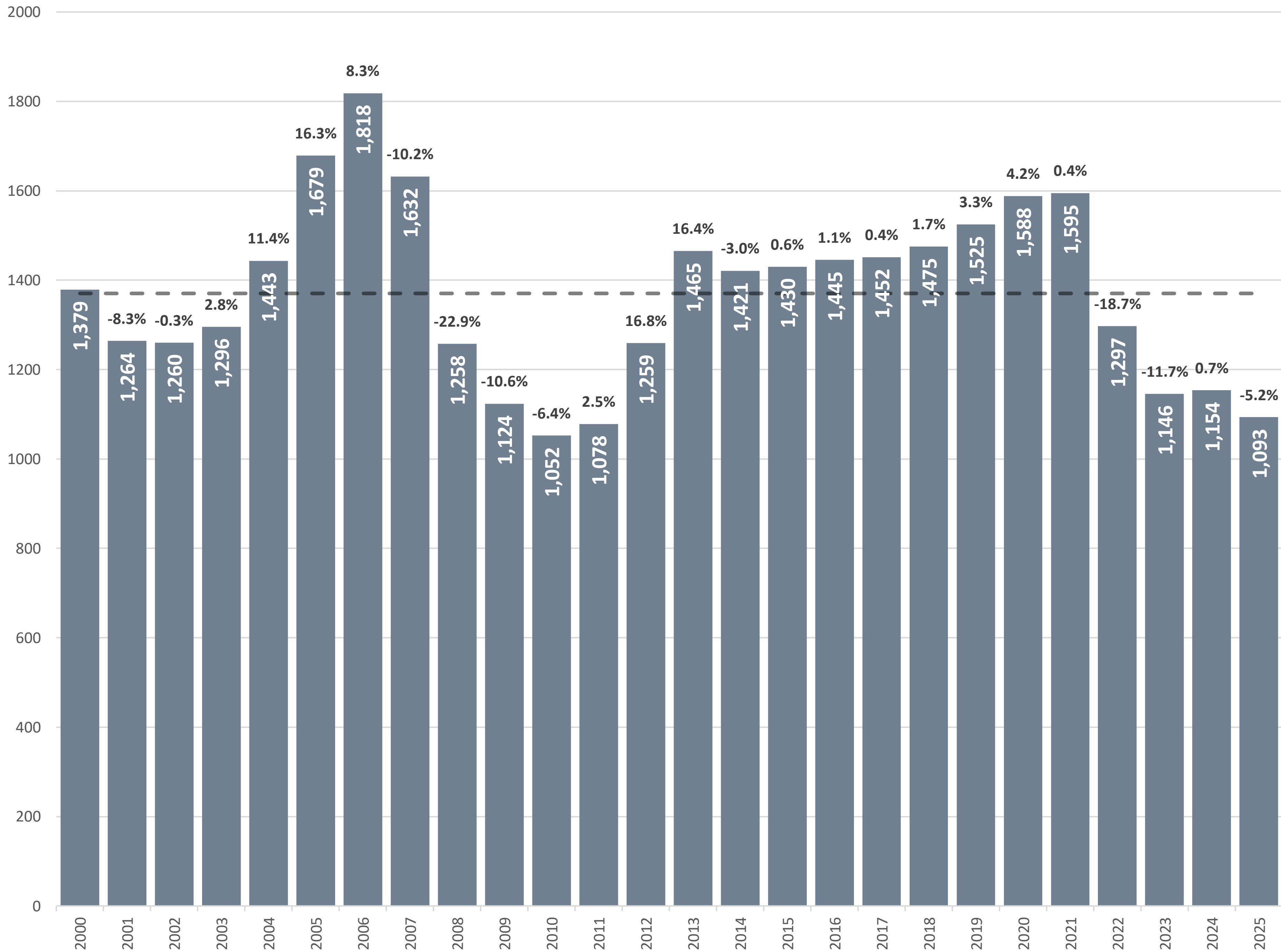
Austin Area Sales Trends and Home Sales : Number of Sold Properties : 2,324

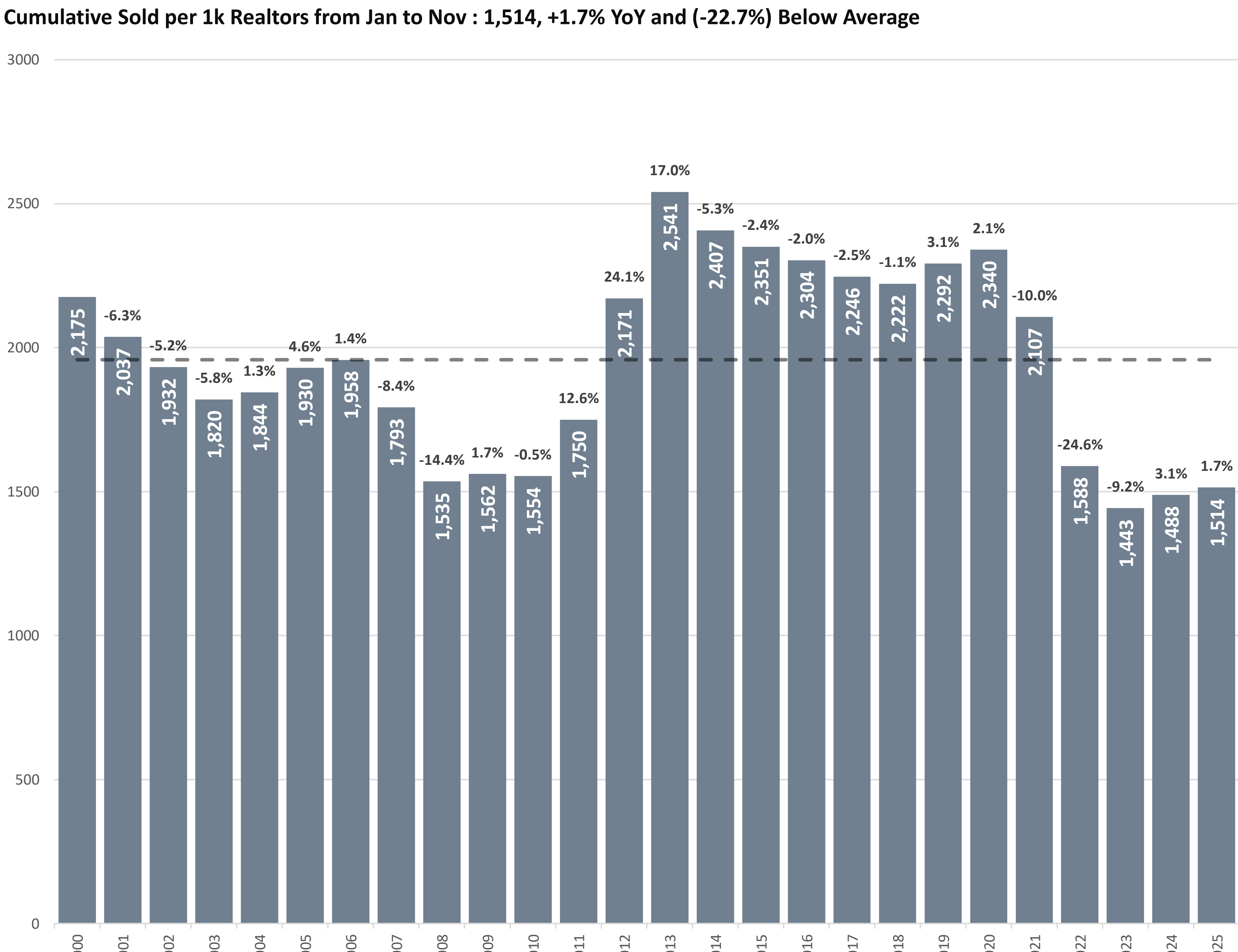
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg	Med
2000	1,021	1,275	1,597	1,549	1,977	1,899	1,839	1,908	1,509	1,528	1,252	1,343	1558	1539
2001	1,079	1,210	1,542	1,571	1,830	1,849	1,865	1,788	1,370	1,340	1,372	1,466	1524	1504
2002	1,159	1,393	1,541	1,656	1,924	1,816	1,717	1,736	1,399	1,467	1,295	1,489	1549	1515
2003	1,088	1,228	1,511	1,539	1,643	1,919	2,030	2,161	1,877	1,600	1,353	1,718	1639	1622
2004	1,089	1,291	1,662	2,039	2,083	2,428	2,362	2,316	1,911	1,689	1,620	1,992	1874	1952
2005	1,427	1,631	2,149	2,140	2,475	2,672	2,689	2,860	2,472	2,108	1,953	2,089	2222	2145
2006	1,597	1,849	2,572	2,404	2,934	3,314	2,969	3,080	2,567	2,349	2,130	2,203	2497	2486
2007	1,626	1,877	2,575	2,535	2,983	3,058	2,913	2,767	1,957	1,874	1,781	1,744	2308	2246
2008	1,412	1,680	2,013	2,164	2,320	2,385	2,264	2,171	1,798	1,422	1,069	1,401	1842	1906
2009	901	1,174	1,469	1,678	1,842	2,238	2,243	1,939	1,932	1,932	1,719	1,493	1713	1781
2010	972	1,245	1,973	2,220	2,276	2,180	1,630	1,659	1,388	1,318	1,321	1,552	1645	1591
2011	1,033	1,197	1,756	1,829	2,046	2,316	2,152	2,190	1,784	1,576	1,469	1,706	1755	1770
2012	1,176	1,401	2,068	2,114	2,592	2,814	2,573	2,611	1,983	2,161	1,798	2,000	2108	2091
2013	1,534	1,771	2,346	2,660	3,145	2,928	3,329	3,275	2,527	2,309	2,007	2,180	2501	2437
2014	1,533	1,859	2,383	2,631	3,126	3,137	3,101	2,939	2,593	2,537	2,011	2,430	2523	2565
2015	1,620	1,926	2,598	2,743	2,946	3,262	3,372	3,142	2,797	2,536	1,951	2,558	2621	2671
2016	1,610	2,004	2,794	2,853	3,279	3,603	3,133	3,224	2,796	2,455	2,347	2,673	2731	2795
2017	1,711	2,085	2,808	2,819	3,486	3,834	3,280	3,289	2,708	2,542	2,449	3,017	2836	2814
2018	1,846	2,251	3,060	3,032	3,674	3,766	3,487	3,406	2,621	2,639	2,504	2,682	2914	2857
2019	1,820	2,379	2,994	3,372	3,921	3,706	3,794	3,605	2,995	2,964	2,775	3,161	3124	3078
2020	2,073	2,617	3,215	2,615	2,680	4,049	4,531	4,093	3,916	3,726	3,410	3,708	3386	3559
2021	2,431	2,308	3,531	3,605	3,909	4,313	3,986	3,811	3,666	3,195	3,201	3,596	3463	3601
2022	2,281	2,578	3,319	3,280	3,640	3,498	2,841	2,944	2,973	2,292	2,088	2,548	2857	2893
2023	1,658	2,181	2,815	2,602	3,442	3,240	2,821	2,985	2,435	2,367	2,110	2,324	2582	2519
2024	1,798	2,313	2,803	3,000	3,225	2,850	2,811	2,763	2,354	2,582	2,346	2,549	2616	2673
2025	1,878	1,995	2,644	2,642	3,119	2,982	2,665	2,735	2,636	2,384	2,324		2546	2642
Avg	1514	1797	2375	2434	2789	2925	2785	2746	2345	2188	1987	2225		
Med	1566	1854	2478	2569	2940	2955	2816	2814	2454	2301	1980	2180		

Cumulative Sold Properties from Jan to Nov : 28,004, (-2.9%) YoY and +8.2% Above Average



Cumulative Sold per 100k Population from Jan to Nov : 1,093, (-5.2%) YoY and (-20.2%) Below Average

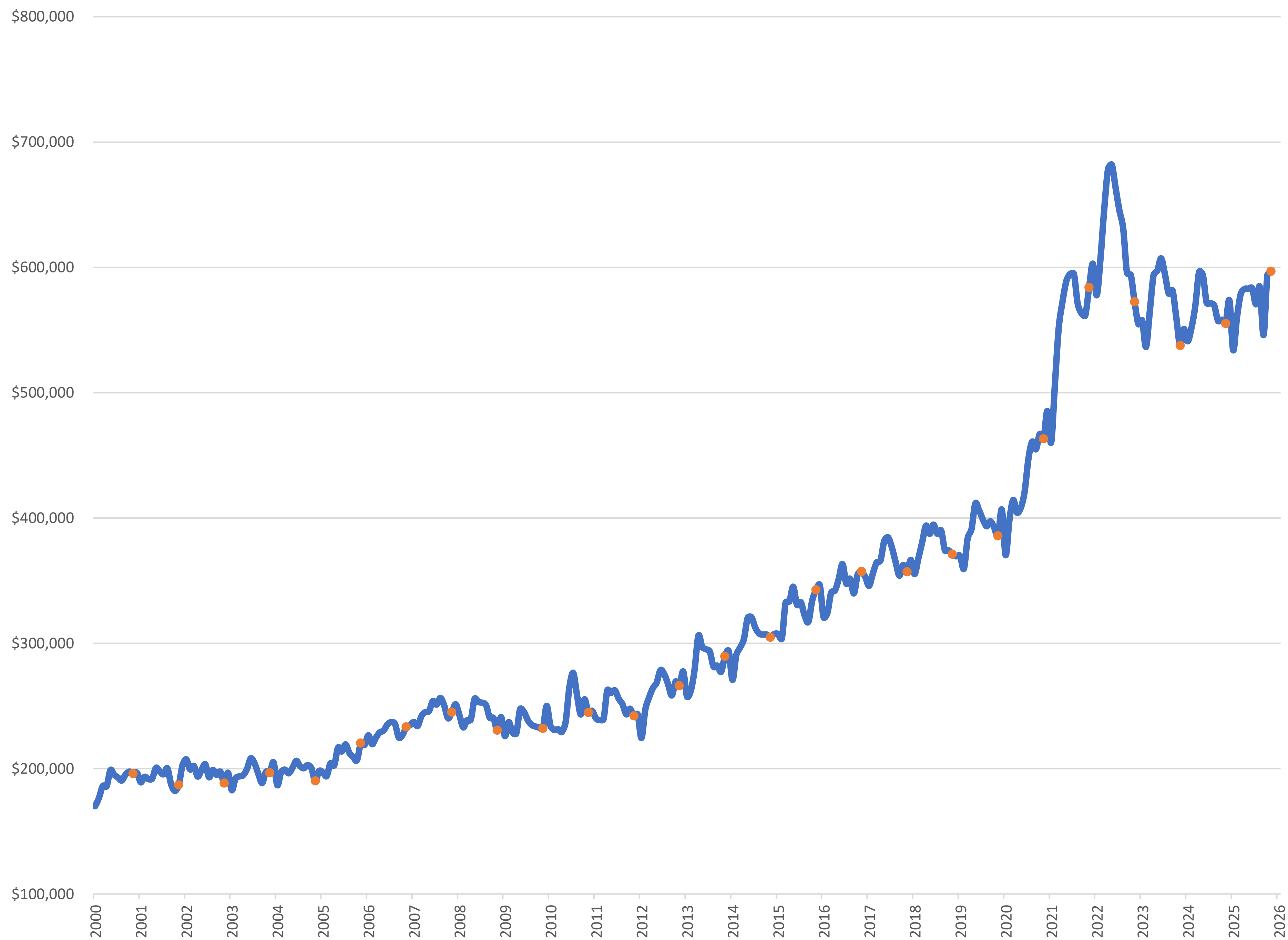


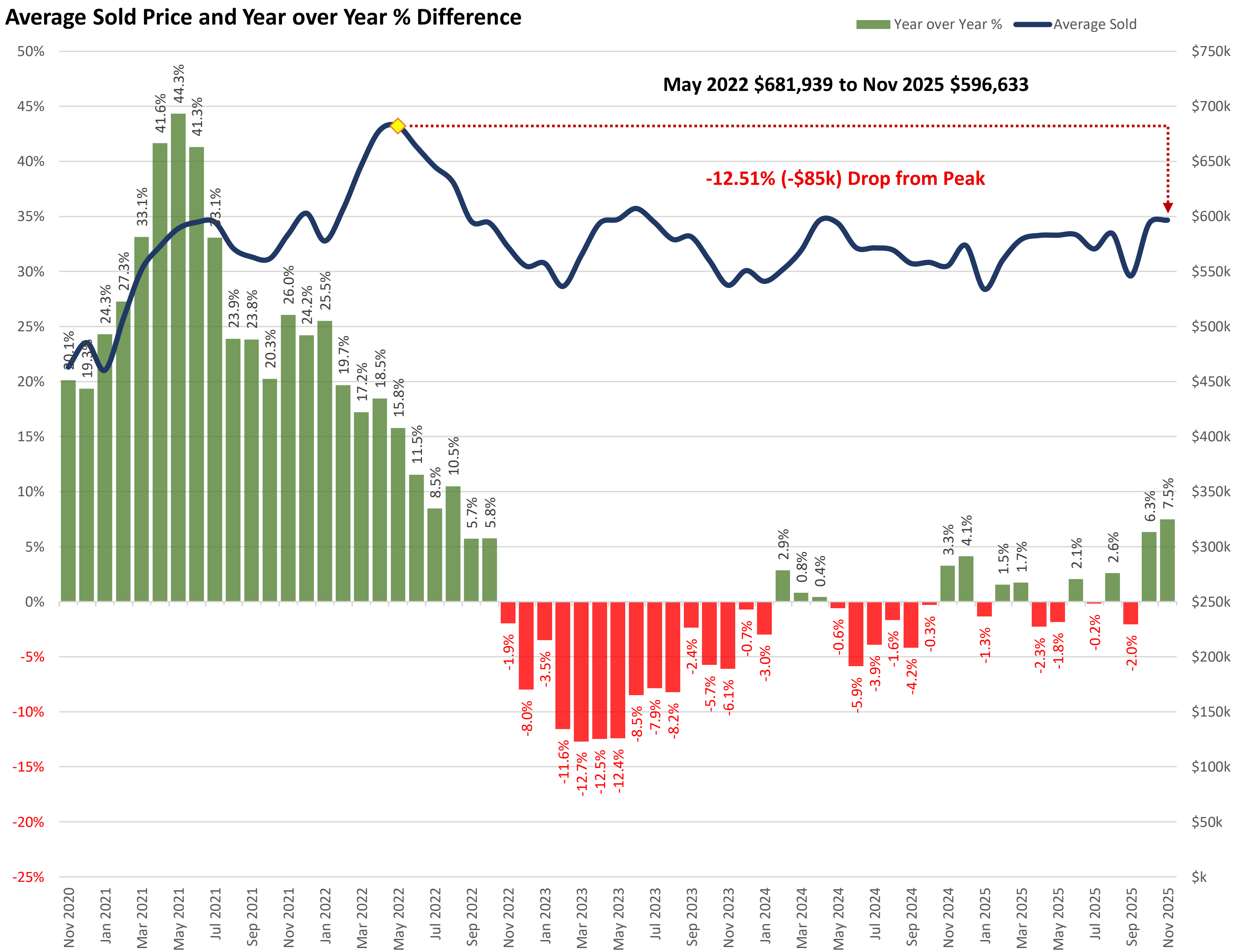

Cumulative Sold per 1k Realtors from Jan to Nov : 1,514, +1.7% YoY and (-22.7%) Below Average
3000
2500
2000
1500
1000
500
0
2,175
-6.3%
2,037
-5.2%
1,932
-5.8%
1,820
1.3%
1,844
4.6%
1,930
1.4%
1,958
-8.4%
1,793
-14.4%
1,535
1.7%
1,562
-0.5%
1,554
12.6%
1,750
24.1%
2,171
17.0%
2,541
-5.3%
2,407
-2.4%
2,351
-2.0%
2,304
-2.5%
2,246
-1.1%
2,222
3.1%
2,292
2.1%
2,340
-10.0%
2,107
-24.6%
1,588
-9.2%
1,443
3.1%
1,488
1.7%
1,514
2000
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025

Residential Sold

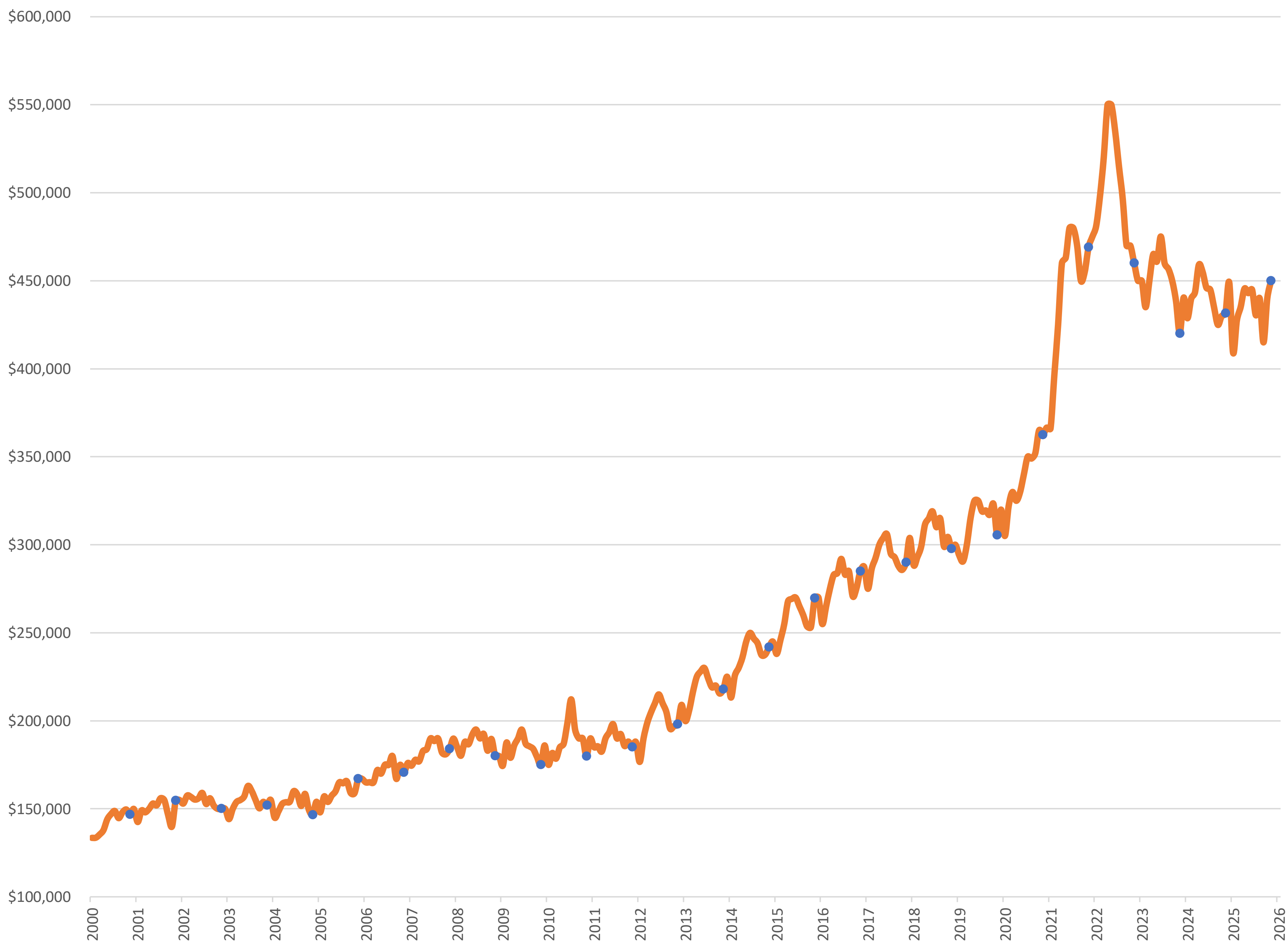
Month	Total Sold	MoM #	MoM %	YoY #	YoY %	Avg. Sold $	MoM $	MoM %	YoY $	YoY %	Median Sold $	MoM $	MoM %	YoY $	YoY %	Sold/ List %
Nov 2023	2,110	-257	-10.9%	22	1.1%	$537,485	($22,394)	-4.0%	($34,860)	-6.1%	$420,000	($18,520)	-4.2%	($40,000)	-8.7%	97.15%
Dec 2023	2,324	214	10.1%	-224	-8.8%	$550,806	$13,321	2.5%	($3,982)	-0.7%	$440,415	$20,415	4.9%	($9,586)	-2.1%	96.52%
Jan 2024	1,798	-526	-22.6%	140	8.4%	$541,032	($9,774)	-1.8%	($16,522)	-3.0%	$428,701	($11,714)	-2.7%	($21,254)	-4.7%	96.70%
Feb 2024	2,313	515	28.6%	132	6.1%	$551,783	$10,751	2.0%	$15,332	2.9%	$439,900	$11,199	2.6%	$4,900	1.1%	97.34%
Mar 2024	2,803	490	21.2%	-12	-0.4%	$569,101	$17,319	3.1%	$4,595	0.8%	$443,500	$3,600	0.8%	($6,500)	-1.4%	97.66%
Apr 2024	3,000	197	7.0%	398	15.3%	$596,315	$27,214	4.8%	$2,593	0.4%	$459,000	$15,500	3.5%	($6,000)	-1.3%	97.94%
May 2024	3,225	225	7.5%	-217	-6.3%	$593,869	($2,446)	-0.4%	($3,455)	-0.6%	$454,990	($4,010)	-0.9%	($6,010)	-1.3%	97.90%
Jun 2024	2,850	-375	-11.6%	-390	-12.0%	$571,656	($22,213)	-3.7%	($35,540)	-5.9%	$446,000	($8,990)	-2.0%	($29,156)	-6.1%	97.52%
Jul 2024	2,811	-39	-1.4%	-10	-0.4%	$571,414	($242)	-0.0%	($23,153)	-3.9%	$445,000	($1,000)	-0.2%	($15,000)	-3.3%	97.52%
Aug 2024	2,763	-48	-1.7%	-222	-7.4%	$569,610	($1,804)	-0.3%	($9,546)	-1.6%	$435,000	($10,000)	-2.2%	($21,750)	-4.8%	97.21%
Sep 2024	2,354	-409	-14.8%	-81	-3.3%	$557,360	($12,250)	-2.2%	($24,192)	-4.2%	$425,000	($10,000)	-2.3%	($25,000)	-5.6%	97.17%
Oct 2024	2,582	228	9.7%	215	9.1%	$558,228	$869	0.2%	($1,651)	-0.3%	$430,000	$5,000	1.2%	($8,520)	-1.9%	96.99%
Nov 2024	2,346	-236	-9.1%	236	11.2%	$555,069	($3,160)	-0.6%	$17,584	3.3%	$431,525	$1,525	0.4%	$11,525	2.7%	97.17%
Dec 2024	2,549	203	8.7%	225	9.7%	$573,559	$18,490	3.3%	$22,753	4.1%	$449,000	$17,476	4.0%	$8,586	1.9%	96.72%
Jan 2025	1,878	-671	-26.3%	80	4.4%	$533,898	($39,660)	-6.9%	($7,134)	-1.3%	$409,192	($39,809)	-8.9%	($19,509)	-4.6%	97.01%
Feb 2025	1,995	117	6.2%	-318	-13.7%	$560,261	$26,362	4.9%	$8,478	1.5%	$427,500	$18,309	4.5%	($12,400)	-2.8%	97.17%
Mar 2025	2,644	649	32.5%	-159	-5.7%	$578,910	$18,650	3.3%	$9,809	1.7%	$435,094	$7,594	1.8%	($8,406)	-1.9%	97.32%
Apr 2025	2,642	-2	-0.1%	-358	-11.9%	$582,770	$3,860	0.7%	($13,545)	-2.3%	$445,500	$10,406	2.4%	($13,500)	-2.9%	97.80%
May 2025	3,119	477	18.1%	-106	-3.3%	$582,979	$209	0.0%	($10,890)	-1.8%	$443,000	($2,500)	-0.6%	($11,990)	-2.6%	97.73%
Jun 2025	2,982	-137	-4.4%	132	4.6%	$583,408	$429	0.1%	$11,752	2.1%	$444,945	$1,945	0.4%	($1,055)	-0.2%	97.25%
Jul 2025	2,665	-317	-10.6%	-146	-5.2%	$570,518	($12,890)	-2.2%	($896)	-0.2%	$430,377	($14,568)	-3.3%	($14,623)	-3.3%	97.14%
Aug 2025	2,735	70	2.6%	-28	-1.0%	$584,416	$13,898	2.4%	$14,807	2.6%	$440,000	$9,623	2.2%	$5,000	1.1%	96.83%
Sep 2025	2,636	-99	-3.6%	282	12.0%	$545,945	($38,471)	-6.6%	($11,415)	-2.0%	$415,000	($25,000)	-5.7%	($10,000)	-2.4%	96.70%
Oct 2025	2,384	-252	-9.6%	-198	-7.7%	$593,610	$47,665	8.7%	$35,382	6.3%	$440,000	$25,000	6.0%	$10,000	2.3%	96.80%
Nov 2025	2,324	-60	-2.5%	-22	-0.9%	$596,633	$3,023	0.5%	$41,564	7.5%	$450,000	$10,000	2.3%	$18,476	4.3%	97.08%

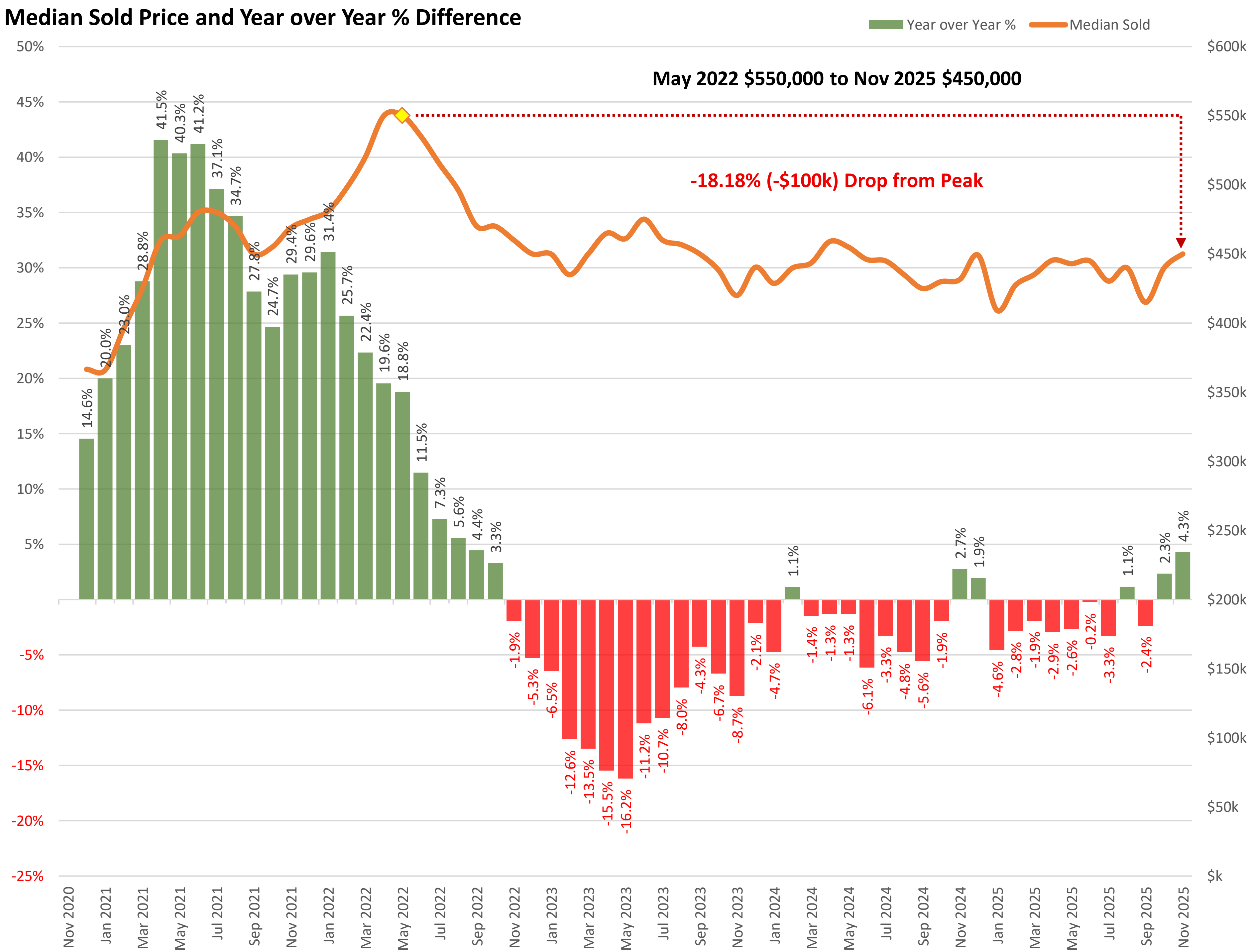
Average Sold Price Nov : $596,633




Average Sold Price and Year over Year % Difference
Year over Year %
Average Sold
May 2022 $681,939 to Nov 2025 $596,633
-12.51% (-$85k) Drop from Peak
50%
45%
40%
35%
30%
25%
20%
15%
10%
5%
0%
-5%
-10%
-15%
-20%
-25%
$750k
$700k
$650k
$600k
$550k
$500k
$450k
$400k
$350k
$300k
$250k
$200k
$150k
$100k
$50k
$k
Nov 2020
Jan 2021
Mar 2021
May 2021
Jul 2021
Sep 2021
Nov 2021
Jan 2022
Mar 2022
May 2022
Jul 2022
Sep 2022
Nov 2022
Jan 2023
Mar 2023
May 2023
Jul 2023
Sep 2023
Nov 2023
Jan 2024
Mar 2024
May 2024
Jul 2024
Sep 2024
Nov 2024
Jan 2025
Mar 2025
May 2025
Jul 2025
Sep 2025
Nov 2025

Median Sold Price : $450,000




Median Sold Price and Year over Year % Difference
Year over Year %
Median Sold
May 2022 $550,000 to Nov 2025 $450,000
-18.18% (-$100k) Drop from Peak
50%
45%
40%
35%
30%
25%
20%
15%
10%
5%
-5%
-10%
-15%
-20%
-25%
$600k
$550k
$500k
$450k
$400k
$350k
$300k
$250k
$200k
$150k
$100k
$50k
$k
14.6%
20.0%
23.0%
28.8%
41.5%
40.3%
41.2%
37.1%
34.7%
27.8%
24.7%
29.4%
29.6%
31.4%
25.7%
22.4%
19.6%
18.8%
11.5%
7.3%
5.6%
4.4%
3.3%
-1.9%
-5.3%
-6.5%
-12.6%
-13.5%
-15.5%
-16.2%
-11.2%
-10.7%
-8.0%
-4.3%
-6.7%
-8.7%
-2.1%
-4.7%
1.1%
-1.4%
-1.3%
-1.3%
-6.1%
-3.3%
-4.8%
-5.6%
-1.9%
2.7%
1.9%
-4.6%
-2.8%
-1.9%
-2.9%
-2.6%
-0.2%
-3.3%
1.1%
-2.4%
2.3%
4.3%
Nov 2020
Jan 2021
Mar 2021
May 2021
Jul 2021
Sep 2021
Nov 2021
Jan 2022
Mar 2022
May 2022
Jul 2022
Sep 2022
Nov 2022
Jan 2023
Mar 2023
May 2023
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Nov 2024
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Mar 2025
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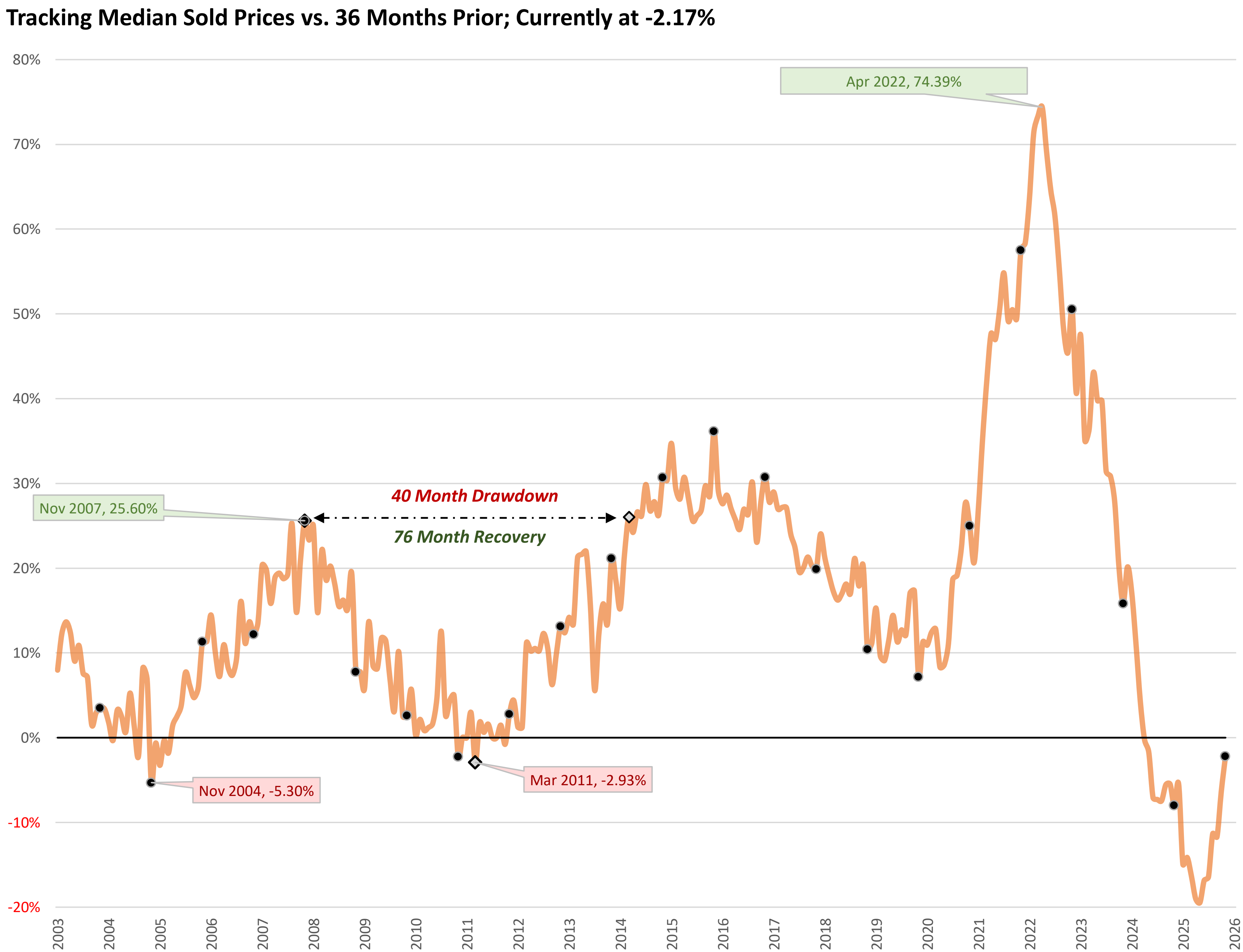
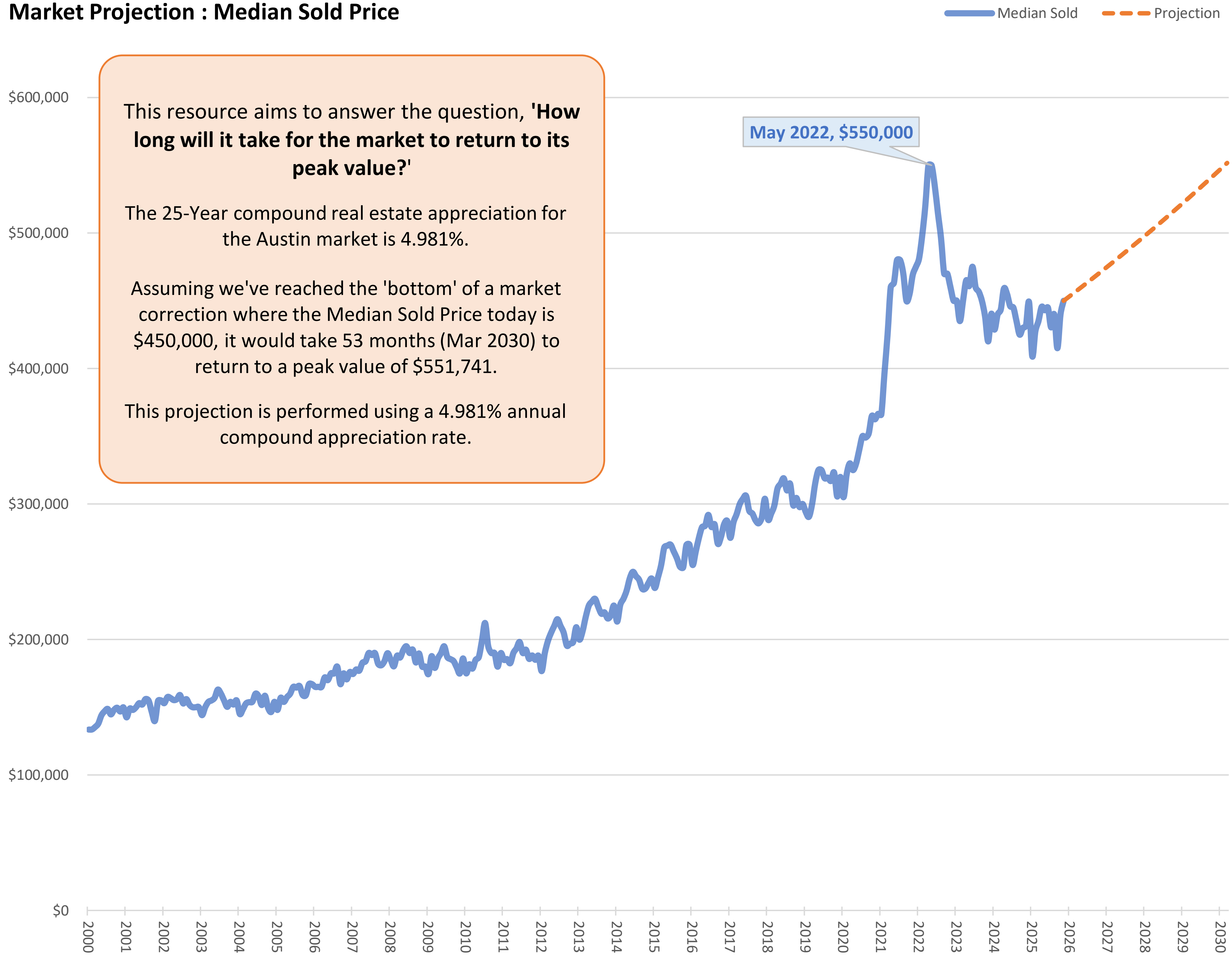
Sep 2025
Nov 2025



Tracking Median Sold Prices vs. 36 Months Prior; Currently at -2.17%
80%
70%
60%
50%
40%
30%
20%
10%
0%
-10%
-20%
Apr 2022, 74.39%
Nov 2007, 25.60%
40 Month Drawdown
76 Month Recovery
Nov 2004, -5.30%
Mar 2011, -2.93%
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026

Market Projection : Median Sold Price



Last Revision : 11/20/2025

Market Cycle

Team Price Real Estate ©

Residential Sold

Year	Total Sold	YoY #	YoY %	Avg. Sold $	YoY $	YoY %	Median Sold $	YoY $	YoY %	Sold$/ List$ %
2000	18,697			$190,174			$143,266			99.2%
2001	18,282	-415	-2.2%	$193,308	$3,134	1.6%	$150,125	$6,859	4.8%	98.5%
2002	18,592	310	1.7%	$197,905	$4,597	2.4%	$154,007	$3,882	2.6%	97.7%
2003	19,667	1,075	5.8%	$196,612	($1,293)	-0.7%	$154,104	$97	0.1%	97.2%
2004	22,482	2,815	14.3%	$198,323	$1,711	0.9%	$152,682	($1,423)	-0.9%	97.3%
2005	26,665	4,183	18.6%	$209,605	$11,282	5.7%	$160,268	$7,586	5.0%	97.8%
2006	29,968	3,303	12.4%	$229,819	$20,215	9.6%	$171,298	$11,030	6.9%	98.1%
2007	27,690	-2,278	-7.6%	$246,054	$16,234	7.1%	$183,445	$12,146	7.1%	97.7%
2008	22,099	-5,591	-20.2%	$243,203	($2,850)	-1.2%	$186,862	$3,417	1.9%	96.7%
2009	20,560	-1,539	-7.0%	$236,265	($6,938)	-2.9%	$184,092	($2,770)	-1.5%	96.7%
2010	19,734	-826	-4.0%	$246,039	$9,773	4.1%	$188,598	$4,506	2.4%	96.5%
2011	21,054	1,320	6.7%	$248,976	$2,937	1.2%	$188,661	$63	0.0%	96.5%
2012	25,291	4,237	20.1%	$262,824	$13,848	5.6%	$200,851	$12,190	6.5%	97.3%
2013	30,011	4,720	18.7%	$284,557	$21,733	8.3%	$218,904	$18,053	9.0%	98.2%
2014	30,280	269	0.9%	$304,101	$19,544	6.9%	$237,699	$18,794	8.6%	98.4%
2015	31,451	1,171	3.9%	$329,028	$24,927	8.2%	$259,804	$22,105	9.3%	98.4%
2016	32,771	1,320	4.2%	$345,511	$16,482	5.0%	$278,383	$18,580	7.2%	98.5%
2017	34,028	1,257	3.8%	$364,979	$19,469	5.6%	$293,290	$14,906	5.4%	98.3%
2018	34,968	940	2.8%	$378,794	$13,815	3.8%	$304,350	$11,060	3.8%	98.3%
2019	37,486	2,518	7.2%	$391,345	$12,551	3.3%	$312,853	$8,503	2.8%	98.6%
2020	40,633	3,147	8.4%	$432,870	$41,525	10.6%	$341,415	$28,562	9.1%	99.5%
2021	41,552	919	2.3%	$562,712	$129,842	30.0%	$449,092	$107,676	31.5%	104.8%
2022	34,282	-7,270	-17.5%	$620,628	$57,916	10.3%	$499,591	$50,500	11.2%	100.9%
2023	30,980	-3,302	-9.6%	$569,325	($51,303)	-8.3%	$448,500	($51,092)	-10.2%	97.2%
2024	31,394	414	1.3%	$567,416	($1,909)	-0.3%	$440,635	($7,865)	-1.8%	97.3%
2025	30,206	-1,188	-3.8%	$573,941	$6,524	1.1%	$434,601	($6,034)	-1.4%	97.2%

** 2025 total sold is a projected figure*

High vs Low Home Price Trends | Nov 2024 vs Nov 2025

Bottom 25th Percentile: Price 0.48%, $/SqFt -0.55%.
Top 25th Percentile: Price 6.56%, $/SqFt 3.68%.

Sold Properties over the past 30 days — This Year vs. Same Period Last Year.

City	# Sold		%	Bottom 25th Percentile						Top 25th Percentile							
				2024		2025		Difference		2024		2025		Difference			
	2024	2025	Diff	Price	$ Sq/Ft	Price	$ Sq/Ft	Price	$ Sq/Ft	Price	$ Sq/Ft	Price	$ Sq/Ft	Price	14	$ Sq/Ft	16
ALL	**2953**	**2359**	**-20.1%**	**$327,935**	**$179**	**$329,523**	**$178**	**0.5%**	**-0.6%**	**$610,000**	**$268**	**$650,000**	**$277**	**6.6%**		**3.7%**	
Austin	807	742	-8.1%	$403,375	$234	$413,250	$241	2.4%	2.9%	$837,450	$413	$878,000	$417	4.8%		1.1%	●
Bastrop	55	42	-23.6%	$324,449	$171	$319,250	$183	-1.6%	6.9%	$495,384	$220	$521,250	$220	5.2%		0.0%	●
Buda	80	46	-42.5%	$309,743	$180	$295,000	$157	-4.8%	-12.6%	$451,325	$207	$438,125	$193	-2.9%		-6.4%	
Burnet	14	14		$347,500	$209	$265,750	$181	-23.5%	-13.2%	$1,124,750	$384	$675,500	$308	-39.9%	●	-19.6%	●
Cedar Creek	22	14	-36.4%	$333,675	$168	$346,250	$184	3.8%	9.4%	$546,491	$220	$404,354	$205	-26.0%	●	-6.8%	●
Cedar Park	64	74	15.6%	$398,750	$205	$379,850	$187	-4.7%	-8.7%	$718,500	$266	$572,250	$239	-20.4%	●	-10.4%	●
Dale	3	3		$386,000	$266	$178,525	$142	-53.8%	-46.7%	$681,000	$366	$578,525	$447	-15.0%		22.1%	
Del Valle	19	22	15.8%	$302,070	$160	$303,295	$149	0.4%	-6.9%	$381,378	$211	$357,500	$184	-6.3%	●	-12.8%	●
Driftwood	6	9	50.0%	$656,250	$282	$875,000	$251	33.3%	-11.1%	$1,180,000	$318	$1,395,000	$403	18.2%	●	26.9%	
Dripping Springs	49	57	16.3%	$465,000	$205	$525,000	$218	12.9%	6.6%	$750,000	$288	$1,000,000	$317	33.3%		10.3%	
Elgin	46	30	-34.8%	$280,000	$157	$263,529	$151	-5.9%	-3.8%	$361,400	$200	$347,548	$200	-3.8%		0.1%	
Georgetown	297	196	-34.0%	$369,999	$188	$356,750	$184	-3.6%	-1.7%	$609,900	$239	$584,466	$232	-4.2%	●	-3.0%	●
Hutto	70	65	-7.1%	$315,000	$165	$300,000	$169	-4.8%	2.3%	$433,743	$213	$414,988	$195	-4.3%		-8.3%	●
Jarrell	68	35	-48.5%	$242,490	$143	$230,500	$138	-4.9%	-3.4%	$302,923	$184	$304,990	$173	0.7%		-5.7%	●
Kyle	169	83	-50.9%	$314,990	$163	$279,490	$150	-11.3%	-8.1%	$419,990	$201	$386,250	$191	-8.0%		-5.3%	

High vs Low Home Price Trends | Nov 2024 vs Nov 2025

Bottom 25th Percentile: Price 0.48%, $/SqFt -0.55%.
Top 25th Percentile: Price 6.56%, $/SqFt 3.68%.

Sold Properties over the past 30 days — This Year vs. Same Period Last Year.

City	# Sold		%	Bottom 25th Percentile						Top 25th Percentile					
				2024		2025		Difference		2024		2025		Difference	
	2024	2025	Diff	Price	$ Sq/Ft	Price	$ Sq/Ft	Price	$ Sq/Ft	Price	$ Sq/Ft	Price	$ Sq/Ft	Price 14	$ Sq/Ft 16
ALL	**2953**	**2359**	**-20.1%**	**$327,935**	**$179**	**$329,523**	**$178**	**0.5%**	**-0.6%**	**$610,000**	**$268**	**$650,000**	**$277**	**6.6%**	**3.7%**
Lago Vista	27	23	-14.8%	$338,500	$205	$370,000	$189	9.3%	-8.0%	$465,100	$266	$657,500	$229	41.4%	-14.0%
Lakeway	19	23	21.1%	$501,500	$260	$587,500	$248	17.1%	-4.8%	$862,500	$320	$780,000	$307	-9.6%	-4.0%
Leander	133	104	-21.8%	$375,000	$191	$343,500	$173	-8.4%	-9.2%	$670,000	$227	$724,648	$243	8.2%	6.7%
Liberty Hill	89	65	-27.0%	$386,492	$178	$355,950	$180	-7.9%	1.2%	$655,000	$230	$683,847	$233	4.4%	1.3%
Lockhart	31	23	-25.8%	$258,195	$157	$218,745	$136	-15.3%	-13.0%	$327,995	$190	$332,000	$206	1.2%	8.3%
Manchaca	1	3	200.0%	$548,000	$217	$604,500	$231	10.3%	6.7%	$548,000	$217	$639,500	$323	16.7%	49.2%
Manor	53	43	-18.9%	$309,000	$166	$280,995	$163	-9.1%	-1.8%	$435,000	$207	$385,000	$194	-11.5%	-6.2%
Marble Falls	32	5	-84.4%	$307,490	$156	$240,000	$175	-21.9%	12.4%	$386,235	$217	$510,000	$191	32.0%	-12.1%
Pflugerville	112	102	-8.9%	$334,998	$183	$355,600	$170	6.2%	-7.0%	$487,125	$226	$492,500	$209	1.1%	-7.4%
Round Rock	159	138	-13.2%	$350,000	$188	$337,000	$177	-3.7%	-6.0%	$542,500	$234	$491,875	$223	-9.3%	-5.0%
San Marcos	87	41	-52.9%	$279,850	$163	$302,591	$167	8.1%	2.5%	$397,000	$206	$422,000	$215	6.3%	4.1%
Smithville	13	1	-92.3%	$310,000	$187	$320,000	$183	3.2%	-2.1%	$399,000	$241	$320,000	$183	-19.8%	-23.9%
Spicewood	19	14	-26.3%	$442,894	$217	$504,925	$214	14.0%	-1.4%	$819,950	$280	$1,173,750	$384	43.1%	37.2%
Taylor	14	14		$278,125	$160	$296,250	$157	6.5%	-1.5%	$374,750	$237	$359,990	$226	-3.9%	-4.7%
Wimberley	16	16		$424,250	$236	$473,000	$216	11.5%	-8.6%	$819,925	$346	$746,500	$297	-9.0%	-14.2%

Appreciation Year over Year City | Median Sold Price ; 9 Cities Up and 21 Down YoY

21 ↓ 9 ↑

City	2000	2010	2015	2020	2024	2025	2000 to 2025 % Diff	2000 to 2025 Avg./ Year	2000 to 2025 Compound Rate	2000 to 2025 Rank	2024 to 2025 % Diff	2024 to 2025 Rank
Austin	$159,900	$228,500	$322,500	$436,500	$571,650	$575,000	260%	10%	5.3%	6	0.6%	7
Bastrop	$119,900	$142,875	$181,250	$266,943	$370,000	$359,000	199%	8%	4.5%	21	-3.0%	18
Buda	$140,000	$170,000	$234,900	$283,200	$369,990	$349,990	150%	6%	3.7%	29	-5.4%	22
Burnet	$107,500	$169,250	$150,250	$273,000	$413,475	$345,000	221%	9%	4.8%	12	-16.6%	30
Cedar Creek	$103,398	$129,000	$155,000	$339,900	$424,498	$403,990	291%	12%	5.6%	4	-4.8%	21
Cedar Park	$145,000	$196,000	$265,000	$355,800	$487,000	$495,000	241%	10%	5.0%	8	1.6%	5
Dale	$76,625	$65,000	$131,450	$216,000	$367,500	$317,800	315%	13%	5.9%	3	-13.5%	29
Del Valle	$100,000	$103,950	$157,500	$235,995	$324,290	$330,303	230%	9%	4.9%	11	1.9%	4
Driftwood	$252,500	$389,900	$514,500	$657,000	$950,000	$1,111,000	340%	14%	6.1%	1	16.9%	1
Dripping Springs	$224,000	$285,000	$388,400	$467,990	$652,500	$643,000	187%	7%	4.3%	24	-1.5%	13
Elgin	$98,000	$101,300	$149,620	$224,641	$314,900	$307,000	213%	9%	4.7%	15	-2.5%	16
Georgetown	$153,700	$185,370	$270,000	$318,885	$461,230	$450,429	193%	8%	4.4%	23	-2.3%	14
Hutto	$109,975	$128,000	$180,000	$259,105	$375,735	$350,000	218%	9%	4.7%	13	-6.8%	25
Jarrell	$105,000	$103,100	$152,700	$202,900	$280,000	$273,250	160%	6%	3.9%	28	-2.4%	15
Kyle	$103,900	$137,250	$183,000	$243,490	$350,265	$327,290	215%	9%	4.7%	14	-6.6%	24

Appreciation Year over Year City | Median Sold Price ; 9 Cities Up and 21 Down YoY

21 ↓ 9 ↑

City	2000	2010	2015	2020	2024	2025	2000 to 2025 % Diff	2000 to 2025 Avg./ Year	2000 to 2025 Compound Rate	2000 to 2025 Rank	2024 to 2025 % Diff	2024 to 2025 Rank
Lago Vista	$144,600	$170,000	$215,750	$297,000	$429,453	$430,000	197%	8%	4.5%	22	0.1%	9
Lakeway	$284,000	$309,000	$403,500	$590,000	$757,500	$752,000	165%	7%	4.0%	26	-0.7%	11
Leander	$109,633	$148,750	$230,000	$310,000	$494,503	$455,000	315%	13%	5.9%	2	-8.0%	27
Liberty Hill	$166,250	$205,750	$299,995	$328,000	$508,127	$505,000	204%	8%	4.5%	18	-0.6%	10
Lockhart	$98,500	$100,000	$139,250	$214,000	$298,890	$294,990	199%	8%	4.5%	20	-1.3%	12
Manchaca	$155,500	$217,750	$263,500	$363,840	$512,125	$475,000	205%	8%	4.6%	17	-7.2%	26
Manor	$130,500	$103,000	$173,450	$241,075	$369,000	$345,000	164%	7%	4.0%	27	-6.5%	23
Marble Falls	$150,000	$219,450	$296,000	$382,000	$358,000	$412,500	175%	7%	4.1%	25	15.2%	2
Pflugerville	$122,500	$155,103	$217,700	$300,343	$400,073	$405,000	231%	9%	4.9%	10	1.2%	6
Round Rock	$138,000	$177,500	$237,200	$317,500	$430,000	$418,000	203%	8%	4.5%	19	-2.8%	17
San Marcos	$146,900	$139,950	$207,185	$265,412	$340,000	$350,000	138%	6%	3.5%	30	2.9%	3
Smithville	$102,500	$112,500	$133,500	$237,500	$331,750	$318,500	211%	8%	4.6%	16	-4.0%	19
Spicewood	$200,000	$330,000	$362,000	$589,900	$747,000	$665,000	233%	9%	4.9%	9	-11.0%	28
Taylor	$85,000	$94,750	$145,700	$218,250	$315,000	$315,671	271%	11%	5.4%	5	0.2%	8
Wimberley	$140,000	$205,450	$249,900	$365,500	$505,000	$483,000	245%	10%	5.1%	7	-4.4%	20

Absorption Rate (Sold / Active Ratio) : 16.61% Historical Average : 31.70%

This ratio, often called the Absorption Rate, measures the proportion of Active listings that sell in a given period. It's a direct measure of demand relative to supply, with higher values indicating a faster-moving market where a larger share of inventory is being sold. Indicator of market absorption. A high ratio (e.g., > 30%) indicates a strong seller's market with high demand, while a low ratio (< 10%) suggests a sluggish market favoring buyers.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Min	Avg	Med	Max
2005	15.0%	17.0%	21.6%	20.5%	23.0%	25.1%	25.8%	28.4%	26.1%	23.0%	22.3%	25.9%	15.0%	22.8%	23.0%	28.4%
2006	18.5%	21.0%	28.0%	25.0%	30.1%	33.3%	29.1%	31.2%	26.4%	24.0%	23.0%	26.2%	18.5%	26.3%	26.3%	33.3%
2007	19.5%	22.0%	28.9%	26.2%	29.0%	28.5%	26.4%	23.9%	16.9%	16.2%	16.0%	17.1%	16.0%	22.6%	22.9%	29.0%
2008	13.6%	15.6%	17.6%	17.9%	18.7%	18.5%	17.5%	17.2%	14.8%	11.9%	9.5%	13.5%	9.5%	15.5%	16.4%	18.7%
2009	8.7%	10.9%	12.9%	14.4%	15.8%	18.8%	18.9%	17.0%	17.6%	18.4%	16.7%	15.6%	8.7%	15.5%	16.3%	18.9%
2010	9.8%	11.8%	17.0%	17.5%	17.5%	16.0%	11.8%	12.5%	11.0%	11.3%	12.4%	15.9%	9.8%	13.7%	12.4%	17.5%
2011	10.8%	12.3%	16.6%	16.4%	17.9%	20.1%	19.3%	20.7%	18.0%	16.6%	16.8%	21.7%	10.8%	17.3%	17.4%	21.7%
2012	15.2%	17.9%	24.9%	24.4%	29.4%	31.1%	28.4%	30.0%	24.3%	28.2%	25.1%	31.9%	15.2%	25.9%	26.7%	31.9%
2013	25.6%	27.9%	28.6%	24.9%	28.4%	26.3%	29.8%	32.0%	25.6%	24.6%	23.5%	29.6%	23.5%	27.2%	27.1%	32.0%
2014	19.9%	22.4%	26.5%	26.6%	30.4%	28.6%	27.8%	27.4%	25.0%	25.6%	22.1%	31.1%	19.9%	26.1%	26.5%	31.1%
2015	20.4%	22.8%	27.9%	26.4%	27.4%	28.7%	28.9%	27.9%	26.2%	25.3%	19.9%	31.6%	19.9%	26.1%	26.9%	31.6%
2016	19.2%	21.3%	27.0%	26.2%	28.2%	30.1%	26.2%	27.7%	24.6%	22.6%	23.6%	33.1%	19.2%	25.8%	26.2%	33.1%
2017	20.5%	27.5%	37.2%	35.4%	40.6%	41.3%	34.2%	34.8%	30.0%	29.6%	31.3%	44.3%	20.5%	33.9%	34.5%	44.3%
2018	28.9%	34.0%	41.9%	37.8%	42.3%	41.2%	37.4%	35.4%	28.0%	29.1%	29.6%	36.5%	28.0%	35.2%	36.0%	42.3%
2019	25.4%	33.0%	39.6%	42.6%	45.9%	42.0%	42.6%	41.7%	35.3%	36.7%	38.2%	49.4%	25.4%	39.4%	40.6%	49.4%
2020	33.7%	42.9%	46.5%	35.2%	38.1%	64.3%	72.3%	75.2%	81.1%	83.0%	90.9%	127.3%	33.7%	65.9%	68.3%	127.3%
2021	104.1%	103.3%	166.8%	133.1%	140.4%	127.2%	91.3%	83.4%	76.4%	69.9%	81.7%	112.6%	69.9%	107.5%	103.7%	166.8%
2022	86.6%	99.8%	106.0%	76.0%	60.1%	39.2%	26.9%	26.9%	25.8%	20.3%	20.1%	27.9%	20.1%	51.3%	33.6%	106.0%
2023	19.0%	25.5%	30.2%	27.1%	33.3%	29.2%	25.4%	26.3%	21.2%	21.0%	19.8%	25.2%	19.0%	25.3%	25.5%	33.3%
2024	20.3%	24.6%	26.7%	25.2%	24.3%	20.6%	20.4%	20.6%	17.8%	20.5%	20.4%	25.0%	17.8%	22.2%	20.6%	26.7%
2025	17.9%	17.8%	20.8%	18.2%	19.6%	18.1%	16.4%	17.6%	17.7%	16.6%			16.4%	18.1%	17.9%	20.8%

Market Flow Score (MFS) : 4.76

Historical Average : 6.59

The Market Flow Score (MFS) measures the overall efficiency of the Austin housing market by combining four key turnover metrics into a single, standardized index. It incorporates the Active-to-Sold ratio, Demand-Supply Velocity (DSV), Market Absorption Efficiency Ratio (MAER), and the Market Turnover Efficiency Score (MTES) to capture how quickly inventory is being absorbed. The MFS is normalized on a 0 to 10 scale, where lower scores reflect a sluggish, supply-heavy market and higher scores indicate faster turnover, stronger demand, and accelerated market momentum.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Min	Avg	Med	Max
2005	2.95	4.20	5.16	4.86	5.80	6.37	6.79	7.81	8.03	6.43	6.61	8.67	2.95	6.14	6.40	8.67
2006	3.98	5.12	6.37	5.80	7.11	7.77	7.03	8.05	7.33	6.43	7.17	8.84	3.98	6.75	7.07	8.84
2007	4.76	5.28	6.33	5.94	9.06	9.04	6.71	6.12	4.60	3.94	4.64	6.85	3.94	6.11	6.03	9.06
2008	2.05	3.43	4.08	4.16	4.62	5.00	4.72	4.94	4.22	2.21	1.22	4.80	1.22	3.79	4.19	5.00
2009	0.00	1.22	2.23	3.15	4.02	5.26	5.26	4.74	5.24	5.38	5.44	5.58	0.00	3.96	4.99	5.58
2010	0.02	1.39	3.51	3.78	5.36	4.46	2.07	3.21	2.23	2.41	3.71	6.47	0.02	3.22	3.36	6.47
2011	1.08	2.33	3.61	3.86	4.84	5.76	5.88	7.01	6.00	4.98	5.66	8.35	1.08	4.95	5.32	8.35
2012	3.33	4.22	5.72	5.76	6.95	7.61	7.67	8.33	7.61	8.21	7.63	9.26	3.33	6.86	7.61	9.26
2013	6.10	6.33	6.53	6.43	7.45	6.97	8.19	8.94	8.39	7.57	8.27	9.10	6.10	7.52	7.51	9.10
2014	5.30	6.12	6.61	6.69	7.21	7.57	7.31	7.69	8.41	7.65	7.87	9.22	5.30	7.30	7.44	9.22
2015	5.54	6.24	6.95	6.47	6.93	7.59	7.39	8.13	8.19	7.61	7.17	9.24	5.54	7.29	7.28	9.24
2016	5.10	5.62	6.65	6.59	7.43	7.75	7.01	8.43	7.53	7.41	8.55	9.34	5.10	7.28	7.42	9.34
2017	5.24	6.39	6.81	6.89	7.75	8.29	7.79	8.75	8.05	7.83	8.65	9.82	5.24	7.69	7.81	9.82
2018	6.67	7.09	7.43	7.11	7.97	8.41	8.43	8.15	7.73	7.77	8.63	9.50	6.67	7.91	7.87	9.50
2019	5.70	7.23	7.37	7.95	8.33	8.51	8.96	9.16	8.57	8.53	9.58	9.96	5.70	8.32	8.52	9.96
2020	6.81	8.07	8.07	7.57	7.05	9.64	9.60	10.00	10.00	9.90	10.00	10.00	6.81	8.89	9.62	10.00
2021	8.84	9.34	8.90	8.45	9.22	8.82	8.31	9.02	9.12	8.84	10.00	10.00	8.31	9.07	8.96	10.00
2022	9.06	9.28	8.49	7.83	7.75	6.51	5.64	6.75	6.93	5.96	7.05	8.98	5.64	7.52	7.40	9.28
2023	4.68	7.15	6.51	6.25	7.55	6.87	6.69	6.87	5.84	6.29	6.37	8.75	4.68	6.65	6.60	8.75
2024	5.04	5.60	5.78	5.62	5.76	5.54	6.06	6.08	5.14	6.29	7.23	8.73	5.04	6.07	5.77	8.73
2025	4.10	4.16	4.62	3.84	4.70	5.34	4.54	5.64	5.84	4.76			3.84	4.75	4.66	5.84