

Monthly Indicators

Eastern Connecticut Association of REALTORS®

SMART M L S



January 2026

U.S. existing-home sales climbed 5.1% month-over-month and 1.4% year-over-year to a seasonally adjusted annual rate of 4.35 million units, the strongest pace in nearly three years, according to the National Association of REALTORS® (NAR). Lower mortgage rates and slower home price growth helped spur buyer activity, and sales increased month-over-month in every region. On an annual basis, sales rose in the South, held steady in the West and Midwest, and declined in the Northeast.

New Listings decreased 4.4 percent for Single Family homes and 20.0 percent for Townhouse/Condo homes. Pending Sales increased 4.0 percent for Single Family homes but decreased 17.2 percent for Townhouse/Condo homes. Inventory decreased 8.6 percent for Single Family homes and 7.9 percent for Townhouse/Condo homes.

Median Sales Price increased 10.0 percent to \$375,000 for Single Family homes but decreased 3.3 percent to \$241,700 for Townhouse/Condo homes. Days on Market decreased 8.1 percent for Single Family homes and 26.1 percent for Townhouse/Condo homes. Months Supply of Inventory decreased 11.8 percent for Single Family homes and 10.0 percent for Townhouse/Condo homes.

Nationally, there were 1.18 million homes for sale heading into January, an 18.1% decline from the previous month but 3.5% higher compared to the same period last year, representing a 3.3-month supply at the current sales pace, according to NAR. Meanwhile, the median existing-home price rose 0.4% from a year ago to \$405,400, reflecting a continued moderation in national price growth.

Quick Facts

- 9.8%

Change in
Closed Sales
All Properties

+ 6.2%

Change in
Median Sales Price
All Properties

- 8.5%

Change in
Homes for Sale
All Properties

This report covers residential real estate activity in the Eastern Connecticut Association of REALTORS® Association service area. Percent changes are calculated using rounded figures.

| | |
|--|----|
| Single Family Market Overview | 2 |
| Townhouse/Condo Market Overview | 3 |
| New Listings | 4 |
| Pending Sales | 5 |
| Closed Sales | 6 |
| Days on Market Until Sale | 7 |
| Median Sales Price | 8 |
| Average Sales Price | 9 |
| Percent of List Price Received | 10 |
| Housing Affordability Index | 11 |
| Inventory of Homes for Sale | 12 |
| Months Supply of Inventory | 13 |
| All Residential Properties Market Overview | 14 |

Single Family Market Overview

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



| Key Metrics | Historical Sparkbars | 1-2025 | 1-2026 | % Change | YTD 2025 | YTD 2026 | % Change |
|---------------------------------------|----------------------|-----------|------------------|----------|-----------|------------------|----------|
| New Listings | | 227 | 217 | - 4.4% | 227 | 217 | - 4.4% |
| Pending Sales | | 175 | 182 | + 4.0% | 175 | 182 | + 4.0% |
| Closed Sales | | 187 | 175 | - 6.4% | 187 | 175 | - 6.4% |
| Days on Market Until Sale | | 37 | 34 | - 8.1% | 37 | 34 | - 8.1% |
| Median Sales Price | | \$341,000 | \$375,000 | + 10.0% | \$341,000 | \$375,000 | + 10.0% |
| Average Sales Price | | \$417,594 | \$468,531 | + 12.2% | \$417,594 | \$468,531 | + 12.2% |
| Percent of List Price Received | | 100.0% | 100.5% | + 0.5% | 100.0% | 100.5% | + 0.5% |
| Housing Affordability Index | | 114 | 111 | - 2.6% | 114 | 111 | - 2.6% |
| Inventory of Homes for Sale | | 406 | 371 | - 8.6% | — | — | — |
| Months Supply of Inventory | | 1.7 | 1.5 | - 11.8% | — | — | — |

Townhouse/Condo Market Overview

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

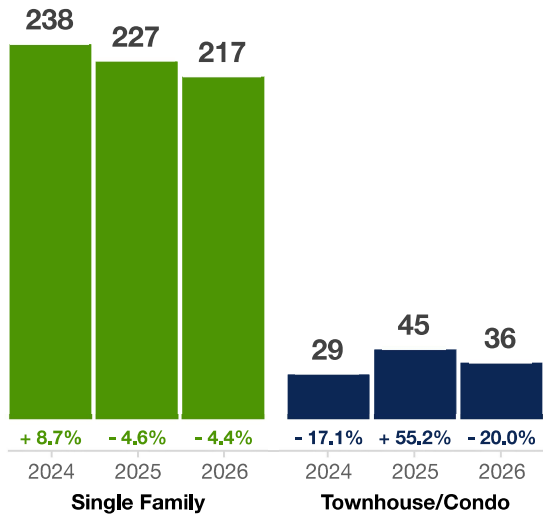


| Key Metrics | Historical Sparkbars | 1-2025 | 1-2026 | % Change | YTD 2025 | YTD 2026 | % Change |
|---------------------------------------|----------------------|-----------|-----------|----------|-----------|-----------|----------|
| New Listings | | 45 | 36 | - 20.0% | 45 | 36 | - 20.0% |
| Pending Sales | | 29 | 24 | - 17.2% | 29 | 24 | - 17.2% |
| Closed Sales | | 38 | 28 | - 26.3% | 38 | 28 | - 26.3% |
| Days on Market Until Sale | | 46 | 34 | - 26.1% | 46 | 34 | - 26.1% |
| Median Sales Price | | \$250,000 | \$241,700 | - 3.3% | \$250,000 | \$241,700 | - 3.3% |
| Average Sales Price | | \$336,701 | \$268,871 | - 20.1% | \$336,701 | \$268,871 | - 20.1% |
| Percent of List Price Received | | 99.7% | 100.0% | + 0.3% | 99.7% | 100.0% | + 0.3% |
| Housing Affordability Index | | 155 | 172 | + 11.0% | 155 | 172 | + 11.0% |
| Inventory of Homes for Sale | | 76 | 70 | - 7.9% | — | — | — |
| Months Supply of Inventory | | 2.0 | 1.8 | - 10.0% | — | — | — |

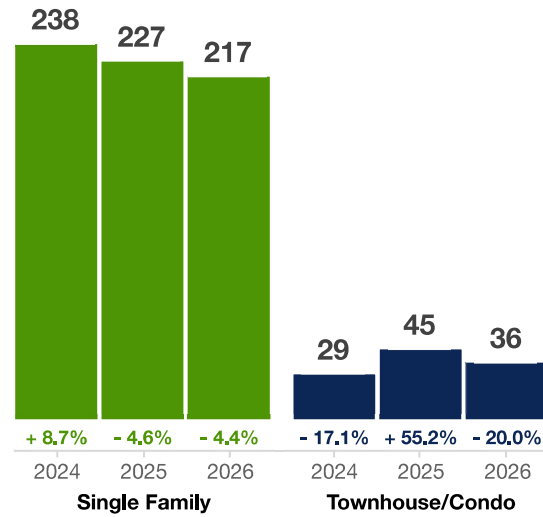
New Listings

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

January

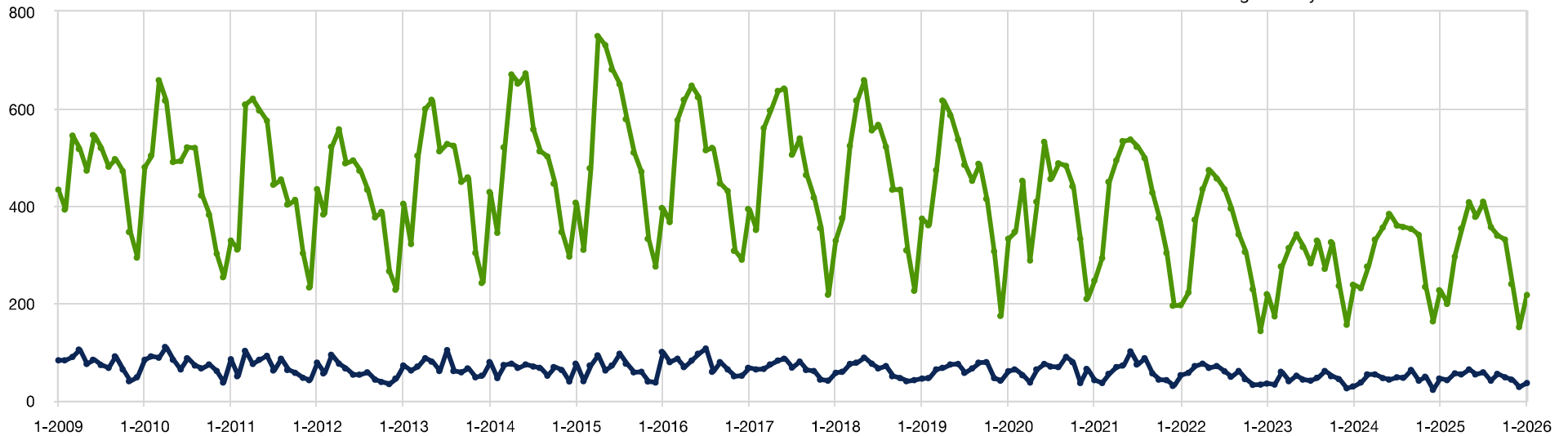


Year to Date



| New Listings | Single Family | Year-Over-Year Change | Townhouse / Condo | Year-Over-Year Change |
|-----------------|---------------|-----------------------|-------------------|-----------------------|
| Feb-2025 | 199 | - 13.9% | 42 | + 13.5% |
| Mar-2025 | 296 | + 7.2% | 56 | + 3.7% |
| Apr-2025 | 354 | + 6.9% | 54 | 0.0% |
| May-2025 | 408 | + 14.6% | 64 | + 39.1% |
| Jun-2025 | 378 | - 1.6% | 54 | + 25.6% |
| Jul-2025 | 409 | + 13.6% | 58 | + 20.8% |
| Aug-2025 | 357 | 0.0% | 41 | - 12.8% |
| Sep-2025 | 339 | - 4.0% | 55 | - 12.7% |
| Oct-2025 | 331 | - 2.9% | 48 | + 17.1% |
| Nov-2025 | 240 | + 2.6% | 43 | - 12.2% |
| Dec-2025 | 151 | - 7.4% | 28 | + 27.3% |
| Jan-2026 | 217 | - 4.4% | 36 | - 20.0% |
| 12-Month Avg | 307 | + 2.0% | 48 | + 4.3% |

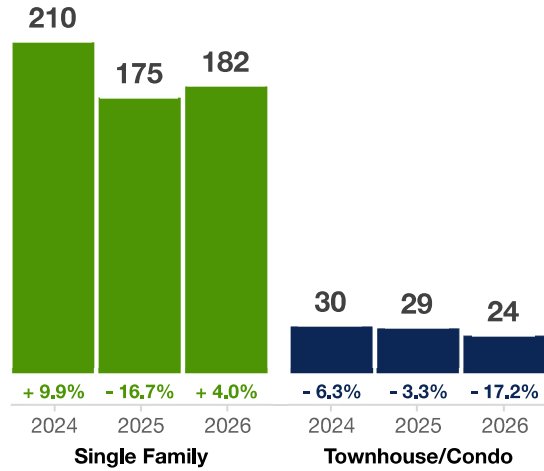
Historical New Listings by Month



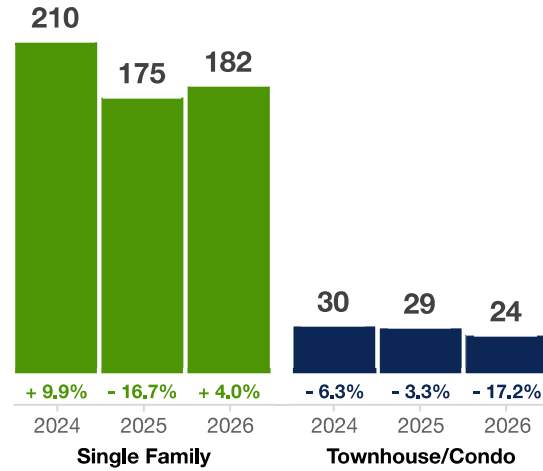
Pending Sales

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

January

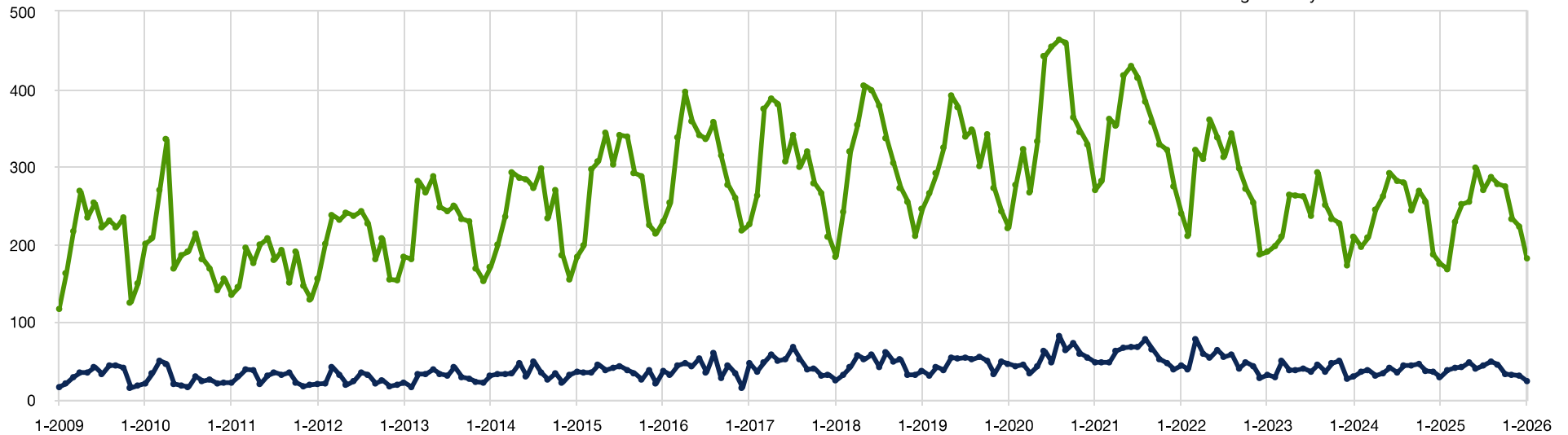


Year to Date



| Pending Sales | Single Family | Year-Over-Year Change | Townhouse / Condo | Year-Over-Year Change |
|-----------------|---------------|-----------------------|-------------------|-----------------------|
| Feb-2025 | 168 | - 14.7% | 38 | + 5.6% |
| Mar-2025 | 229 | + 9.6% | 41 | + 7.9% |
| Apr-2025 | 252 | + 2.9% | 42 | + 35.5% |
| May-2025 | 255 | - 2.7% | 48 | + 41.2% |
| Jun-2025 | 299 | + 2.4% | 40 | - 2.4% |
| Jul-2025 | 270 | - 4.3% | 44 | + 25.7% |
| Aug-2025 | 287 | + 2.5% | 49 | + 11.4% |
| Sep-2025 | 278 | + 13.9% | 45 | + 2.3% |
| Oct-2025 | 275 | + 2.2% | 33 | - 28.3% |
| Nov-2025 | 233 | - 8.6% | 32 | - 13.5% |
| Dec-2025 | 223 | + 19.3% | 31 | - 13.9% |
| Jan-2026 | 182 | + 4.0% | 24 | - 17.2% |
| 12-Month Avg | 246 | + 2.1% | 39 | + 2.6% |

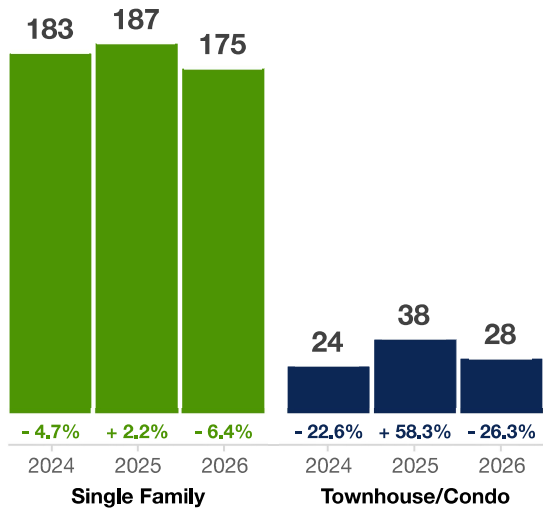
Historical Pending Sales by Month



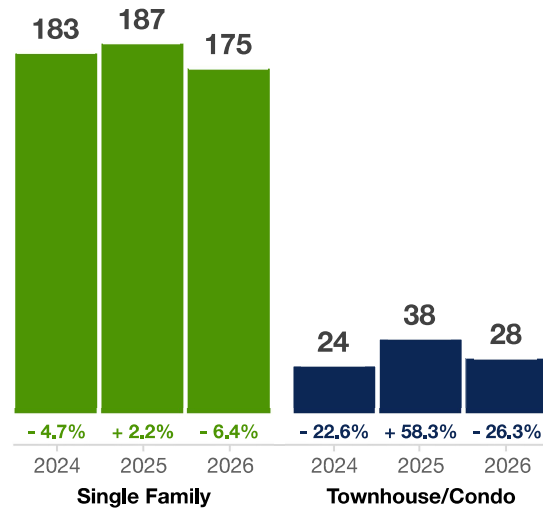
Closed Sales

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

January

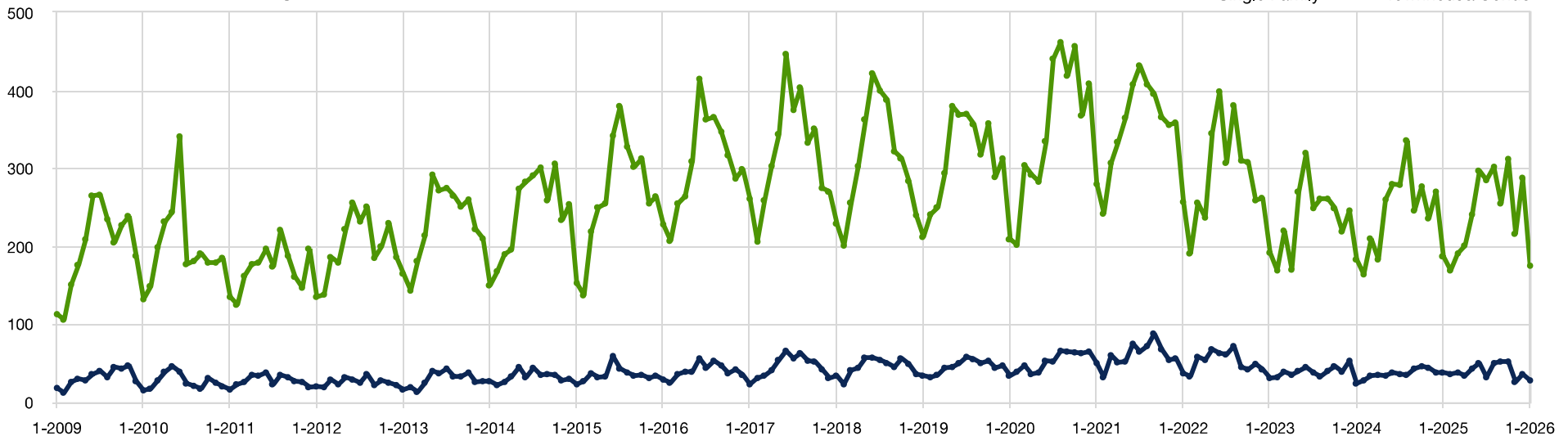


Year to Date



| Closed Sales | Single Family | Year-Over-Year Change | Townhouse / Condo | Year-Over-Year Change |
|-----------------|---------------|-----------------------|-------------------|-----------------------|
| Feb-2025 | 169 | + 3.0% | 36 | + 28.6% |
| Mar-2025 | 191 | - 9.0% | 38 | + 11.8% |
| Apr-2025 | 201 | + 9.8% | 34 | - 2.9% |
| May-2025 | 241 | - 7.3% | 43 | + 26.5% |
| Jun-2025 | 297 | + 6.1% | 50 | + 31.6% |
| Jul-2025 | 285 | + 2.2% | 32 | - 11.1% |
| Aug-2025 | 302 | - 10.1% | 50 | + 42.9% |
| Sep-2025 | 255 | + 3.7% | 52 | + 20.9% |
| Oct-2025 | 312 | + 12.6% | 52 | + 13.0% |
| Nov-2025 | 216 | - 8.5% | 26 | - 40.9% |
| Dec-2025 | 288 | + 6.7% | 36 | - 5.3% |
| Jan-2026 | 175 | - 6.4% | 28 | - 26.3% |
| 12-Month Avg | 244 | 0.0% | 40 | + 8.1% |

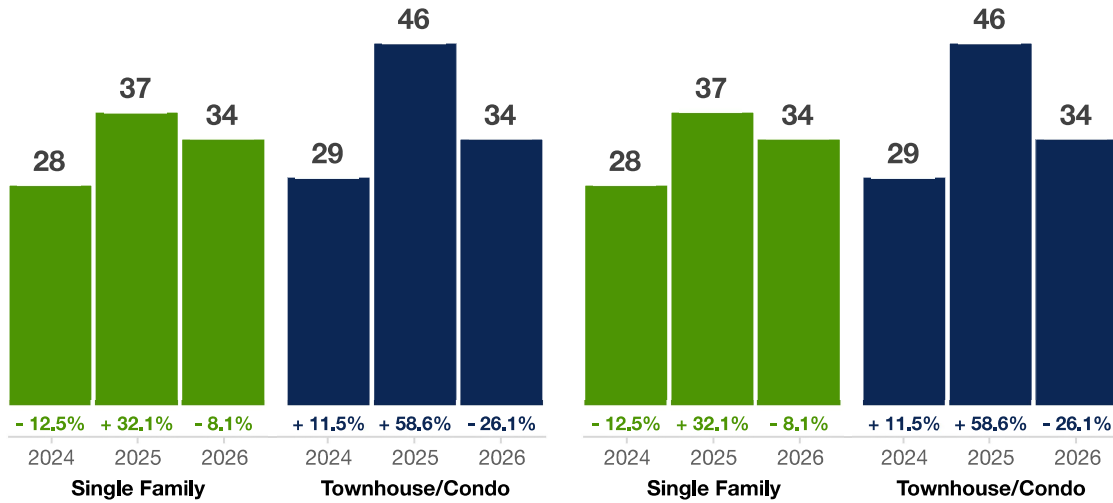
Historical Closed Sales by Month



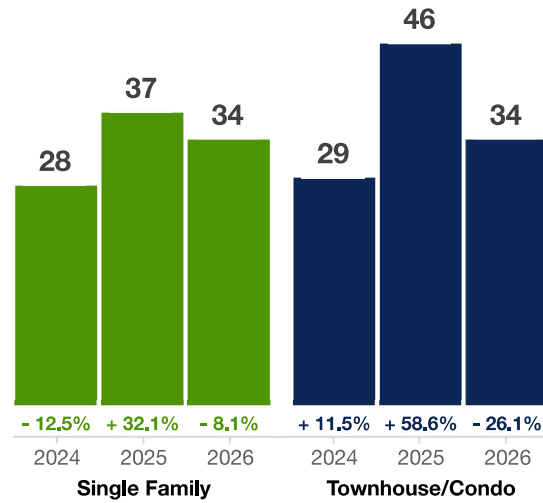
Days on Market Until Sale

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

January



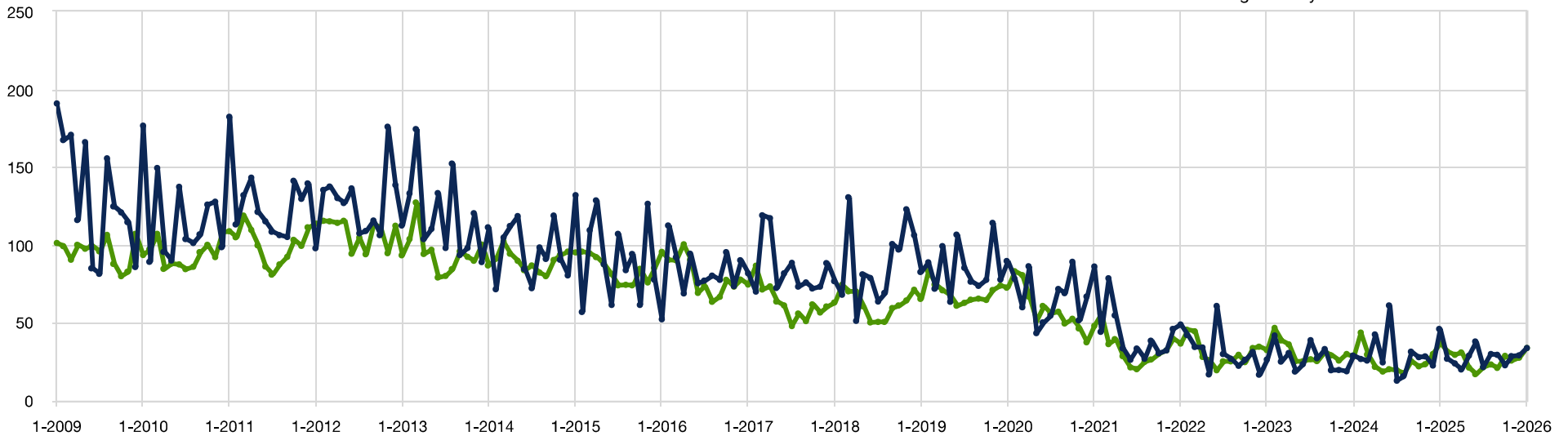
Year to Date



| Days on Market | Single Family | Year-Over-Year Change | Townhouse / Condo | Year-Over-Year Change |
|-----------------|---------------|-----------------------|-------------------|-----------------------|
| Feb-2025 | 32 | - 27.3% | 27 | 0.0% |
| Mar-2025 | 29 | - 3.3% | 24 | - 7.7% |
| Apr-2025 | 31 | + 40.9% | 20 | - 53.5% |
| May-2025 | 21 | + 10.5% | 29 | + 16.0% |
| Jun-2025 | 17 | - 15.0% | 38 | - 37.7% |
| Jul-2025 | 21 | + 10.5% | 21 | + 61.5% |
| Aug-2025 | 23 | + 35.3% | 30 | + 87.5% |
| Sep-2025 | 21 | - 16.0% | 29 | - 6.5% |
| Oct-2025 | 29 | + 31.8% | 23 | - 17.9% |
| Nov-2025 | 26 | + 13.0% | 29 | + 3.6% |
| Dec-2025 | 27 | - 10.0% | 29 | + 31.8% |
| Jan-2026 | 34 | - 8.1% | 34 | - 26.1% |
| 12-Month Avg* | 25 | + 2.8% | 28 | - 8.9% |

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

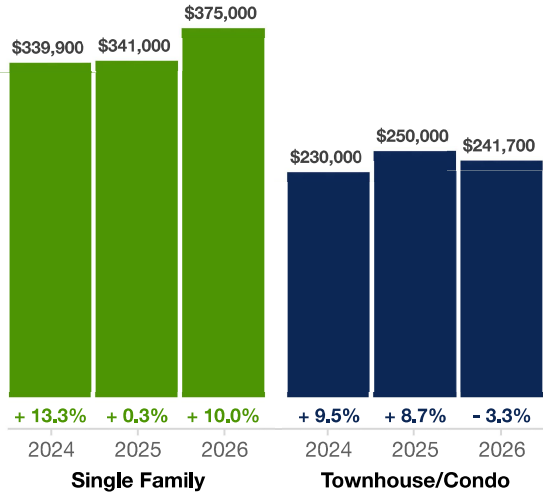
Historical Days on Market Until Sale by Month



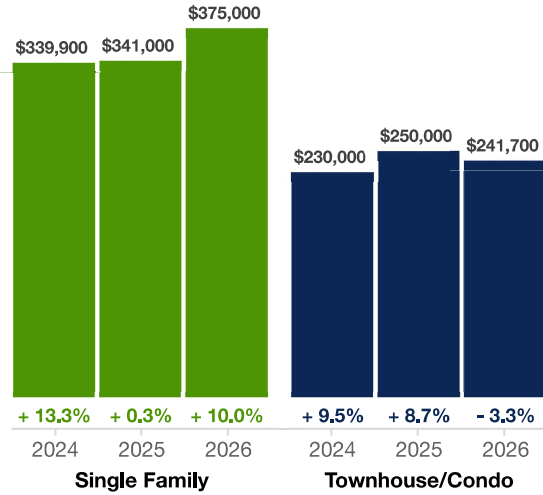
Median Sales Price

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

January



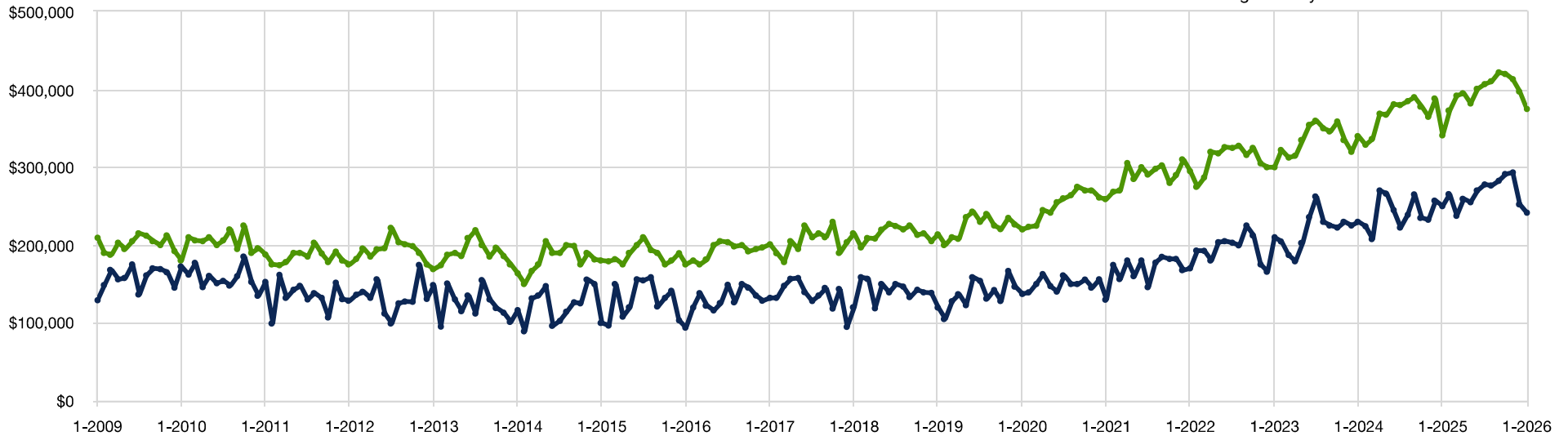
Year to Date



| Median Sales Price | Single Family | Year-Over-Year Change | Townhouse / Condo | Year-Over-Year Change |
|--------------------|------------------|-----------------------|-------------------|-----------------------|
| Feb-2025 | \$373,000 | + 13.4% | \$265,500 | + 18.4% |
| Mar-2025 | \$392,000 | + 16.6% | \$237,500 | + 14.5% |
| Apr-2025 | \$395,000 | + 7.0% | \$259,500 | - 3.9% |
| May-2025 | \$382,077 | + 4.0% | \$255,000 | - 4.2% |
| Jun-2025 | \$401,000 | + 5.2% | \$270,000 | + 10.2% |
| Jul-2025 | \$407,000 | + 7.1% | \$278,000 | + 24.9% |
| Aug-2025 | \$410,500 | + 6.6% | \$276,500 | + 15.7% |
| Sep-2025 | \$422,000 | + 8.2% | \$282,500 | + 6.6% |
| Oct-2025 | \$419,950 | + 11.1% | \$291,225 | + 23.9% |
| Nov-2025 | \$413,250 | + 13.2% | \$293,250 | + 26.1% |
| Dec-2025 | \$397,500 | + 2.3% | \$252,500 | - 1.8% |
| Jan-2026 | \$375,000 | + 10.0% | \$241,700 | - 3.3% |
| 12-Month Avg* | \$400,000 | + 8.1% | \$265,000 | + 10.4% |

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

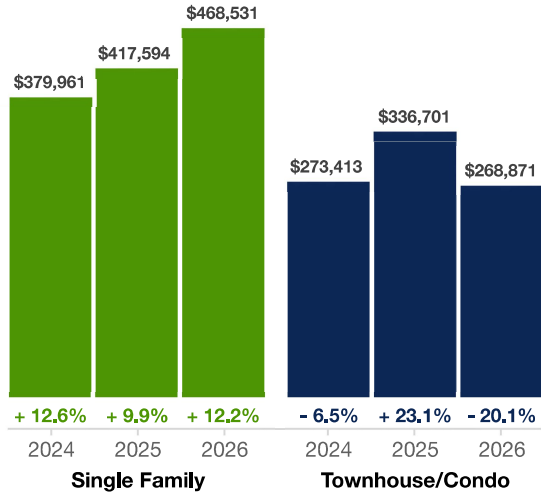
Historical Median Sales Price by Month



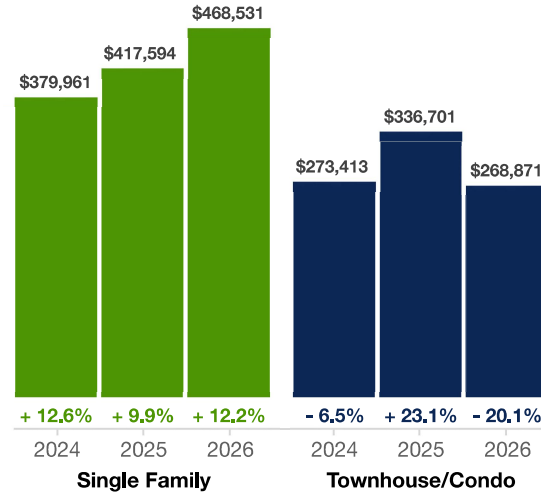
Average Sales Price

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

January



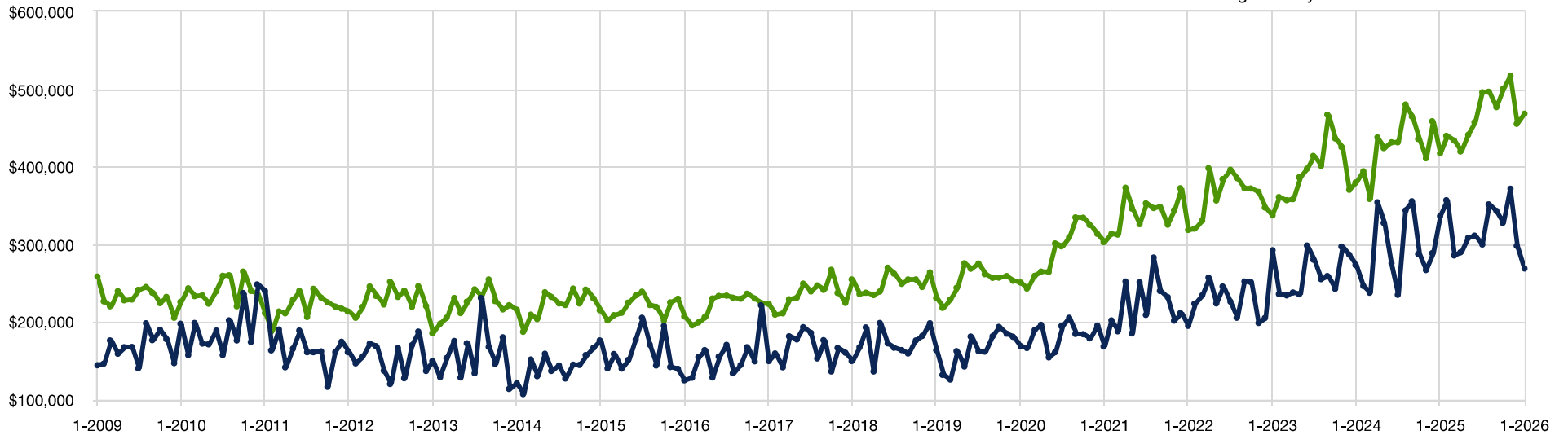
Year to Date



| Avg. Sales Price | Single Family | Year-Over-Year Change | Townhouse / Condo | Year-Over-Year Change |
|------------------|------------------|-----------------------|-------------------|-----------------------|
| Feb-2025 | \$439,900 | + 11.6% | \$357,075 | + 44.9% |
| Mar-2025 | \$434,072 | + 21.0% | \$285,657 | + 20.2% |
| Apr-2025 | \$419,981 | - 4.1% | \$290,018 | - 18.2% |
| May-2025 | \$441,565 | + 4.1% | \$308,821 | - 5.8% |
| Jun-2025 | \$457,673 | + 6.0% | \$311,264 | + 12.9% |
| Jul-2025 | \$496,003 | + 14.9% | \$300,063 | + 27.6% |
| Aug-2025 | \$496,828 | + 3.4% | \$351,738 | + 2.2% |
| Sep-2025 | \$476,989 | + 2.6% | \$343,117 | - 3.6% |
| Oct-2025 | \$500,360 | + 14.8% | \$327,860 | + 13.9% |
| Nov-2025 | \$517,183 | + 25.8% | \$371,900 | + 39.2% |
| Dec-2025 | \$455,641 | - 0.7% | \$298,245 | + 3.3% |
| Jan-2026 | \$468,531 | + 12.2% | \$268,871 | - 20.1% |
| 12-Month Avg* | \$470,017 | + 8.6% | \$319,554 | + 7.4% |

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

Historical Average Sales Price by Month

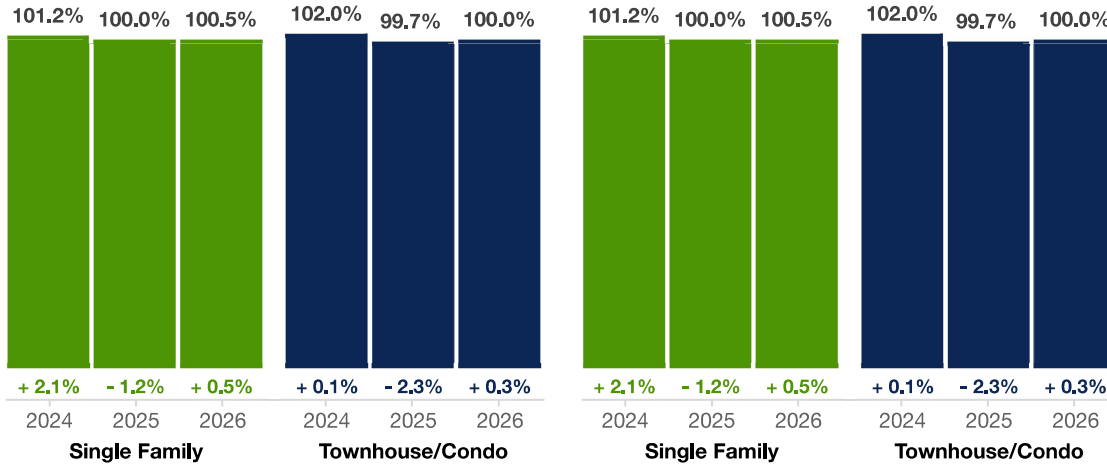


Percent of List Price Received

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

January

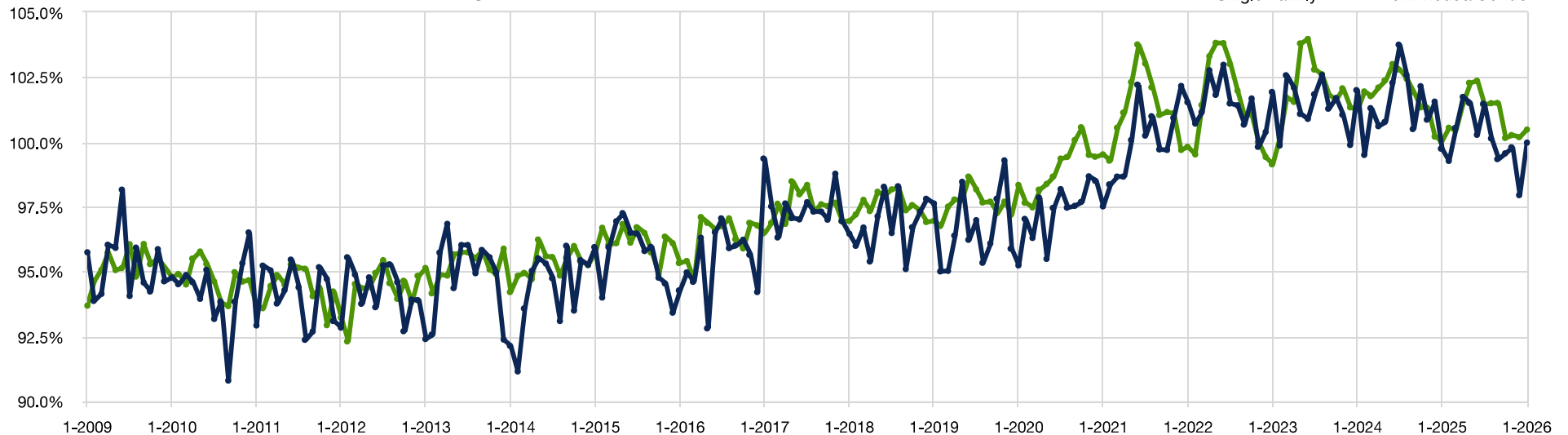
Year to Date



| Pct. of List Price Received | Single Family | Year-Over-Year Change | Townhouse / Condo | Year-Over-Year Change |
|-----------------------------|---------------|-----------------------|-------------------|-----------------------|
| Feb-2025 | 100.6% | - 1.4% | 99.3% | - 0.2% |
| Mar-2025 | 100.5% | - 1.3% | 100.5% | - 0.8% |
| Apr-2025 | 101.5% | - 0.6% | 101.7% | + 1.1% |
| May-2025 | 102.3% | - 0.1% | 101.5% | + 0.7% |
| Jun-2025 | 102.4% | - 0.6% | 100.3% | - 2.0% |
| Jul-2025 | 101.5% | - 1.3% | 101.5% | - 2.2% |
| Aug-2025 | 101.5% | - 1.0% | 100.1% | - 2.4% |
| Sep-2025 | 101.5% | - 0.4% | 99.3% | - 1.2% |
| Oct-2025 | 100.2% | - 1.1% | 99.6% | - 2.5% |
| Nov-2025 | 100.3% | - 1.0% | 99.8% | - 1.1% |
| Dec-2025 | 100.2% | 0.0% | 98.0% | - 3.5% |
| Jan-2026 | 100.5% | + 0.5% | 100.0% | + 0.3% |
| 12-Month Avg* | 101.1% | - 0.7% | 100.1% | - 1.2% |

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

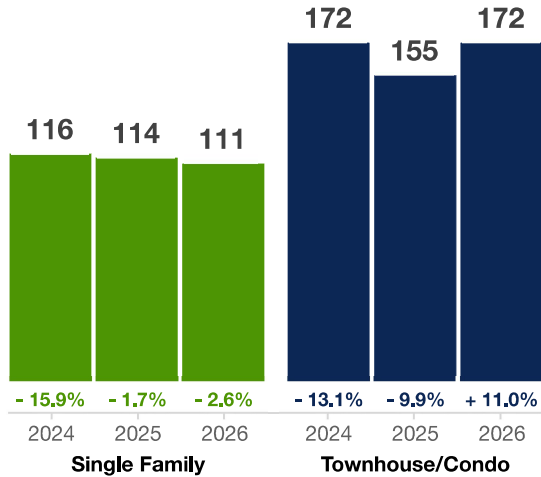
Historical Percent of List Price Received by Month



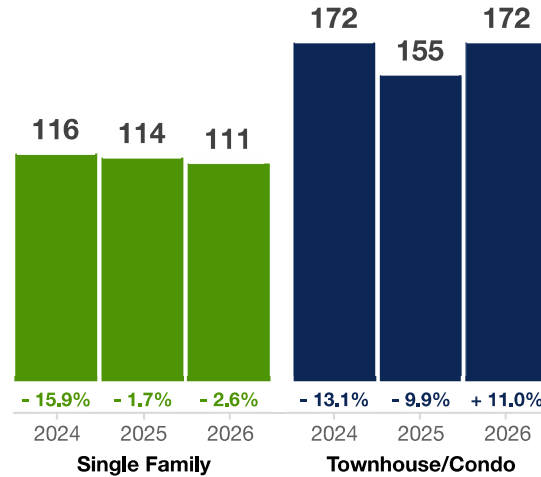
Housing Affordability Index

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

January

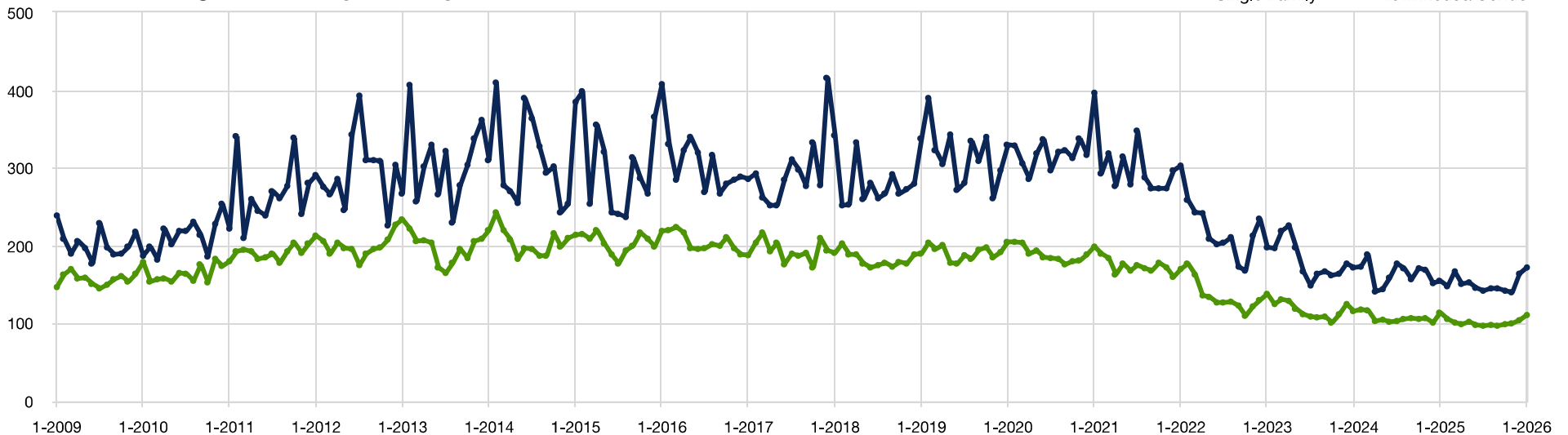


Year to Date



| Affordability Index | Single Family | Year-Over-Year Change | Townhouse / Condo | Year-Over-Year Change |
|---------------------|---------------|-----------------------|-------------------|-----------------------|
| Feb-2025 | 106 | - 10.2% | 148 | - 14.5% |
| Mar-2025 | 101 | - 13.7% | 167 | - 11.6% |
| Apr-2025 | 99 | - 3.9% | 151 | + 7.1% |
| May-2025 | 102 | - 2.9% | 153 | + 6.3% |
| Jun-2025 | 98 | - 3.9% | 146 | - 8.2% |
| Jul-2025 | 97 | - 5.8% | 142 | - 19.8% |
| Aug-2025 | 98 | - 7.5% | 145 | - 15.2% |
| Sep-2025 | 97 | - 9.3% | 145 | - 7.6% |
| Oct-2025 | 99 | - 6.6% | 142 | - 17.0% |
| Nov-2025 | 100 | - 6.5% | 140 | - 17.2% |
| Dec-2025 | 104 | + 3.0% | 164 | + 7.9% |
| Jan-2026 | 111 | - 2.6% | 172 | + 11.0% |
| 12-Month Avg | 101 | - 5.6% | 151 | - 7.4% |

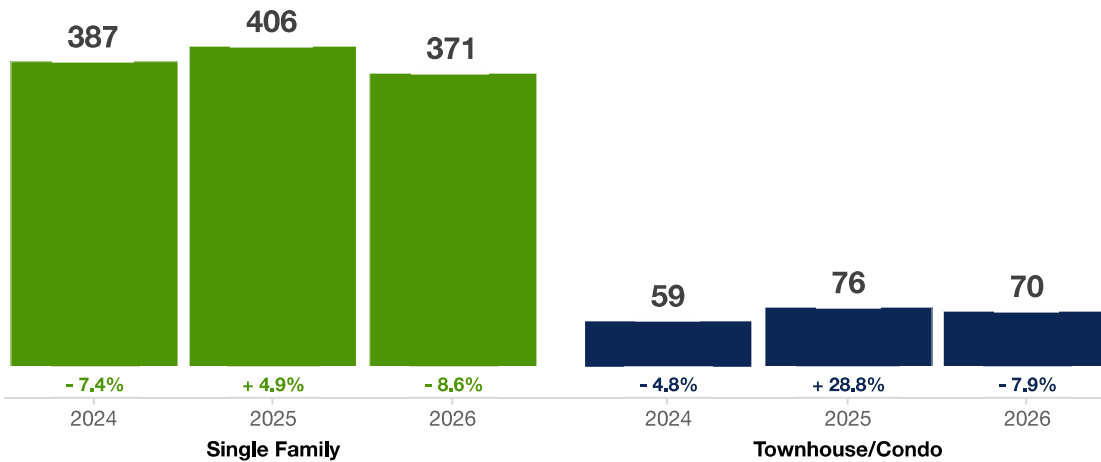
Historical Housing Affordability Index by Month



Inventory of Homes for Sale

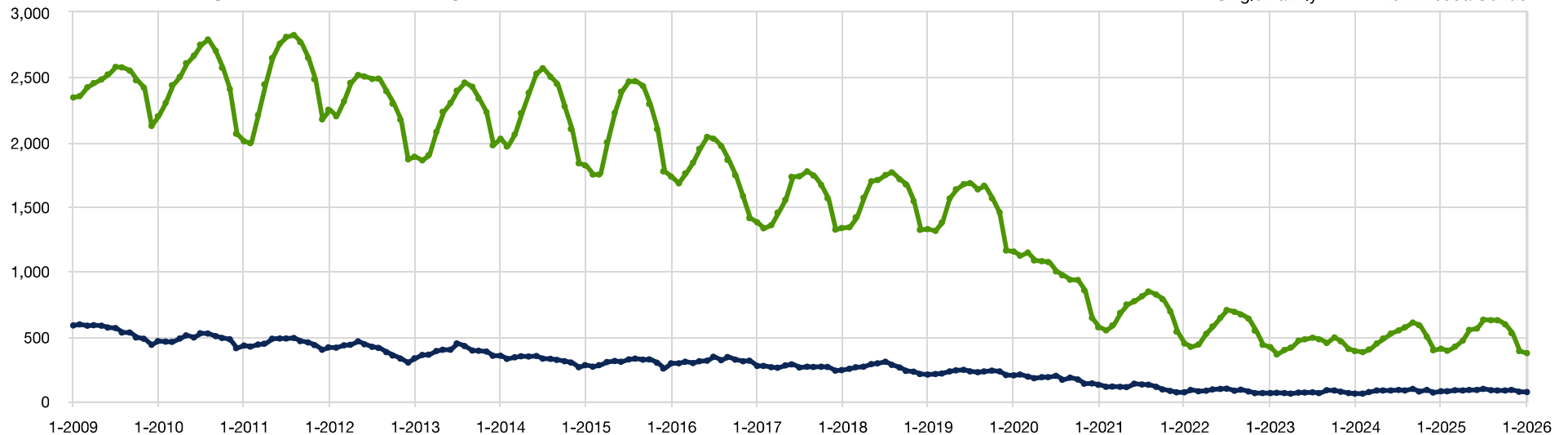
The number of properties available for sale in active status at the end of a given month.

January



| Homes for Sale | Single Family | Year-Over-Year Change | Townhouse / Condo | Year-Over-Year Change |
|-----------------|---------------|-----------------------|-------------------|-----------------------|
| Feb-2025 | 390 | + 2.9% | 76 | + 31.0% |
| Mar-2025 | 421 | + 5.3% | 84 | + 20.0% |
| Apr-2025 | 467 | + 4.7% | 83 | 0.0% |
| May-2025 | 550 | + 13.9% | 86 | + 3.6% |
| Jun-2025 | 561 | + 7.3% | 87 | + 6.1% |
| Jul-2025 | 629 | + 15.0% | 95 | + 10.5% |
| Aug-2025 | 625 | + 9.6% | 85 | + 3.7% |
| Sep-2025 | 624 | + 2.8% | 83 | - 11.7% |
| Oct-2025 | 593 | + 1.0% | 83 | + 10.7% |
| Nov-2025 | 527 | + 6.0% | 86 | 0.0% |
| Dec-2025 | 388 | - 1.5% | 72 | + 7.5% |
| Jan-2026 | 371 | - 8.6% | 70 | - 7.9% |
| 12-Month Avg | 512 | + 5.1% | 83 | + 5.1% |

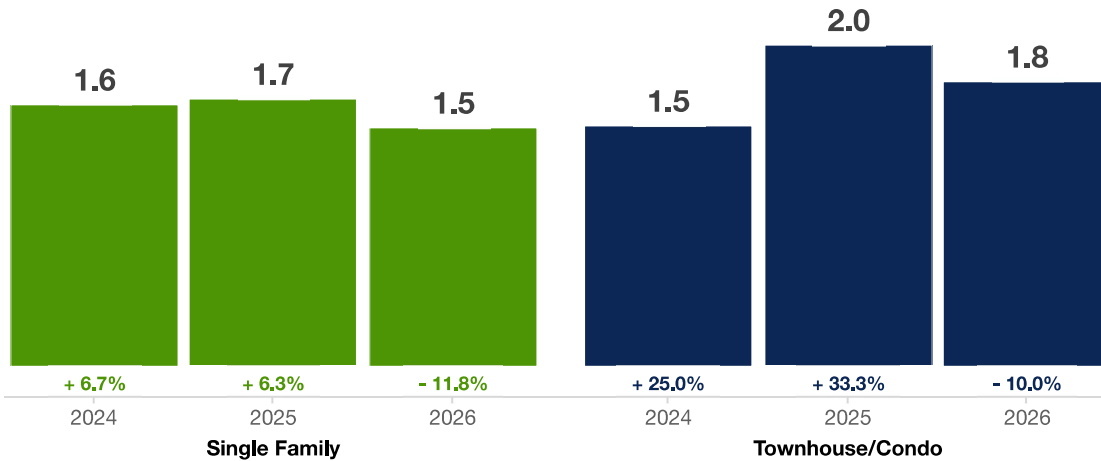
Historical Inventory of Homes for Sale by Month



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.

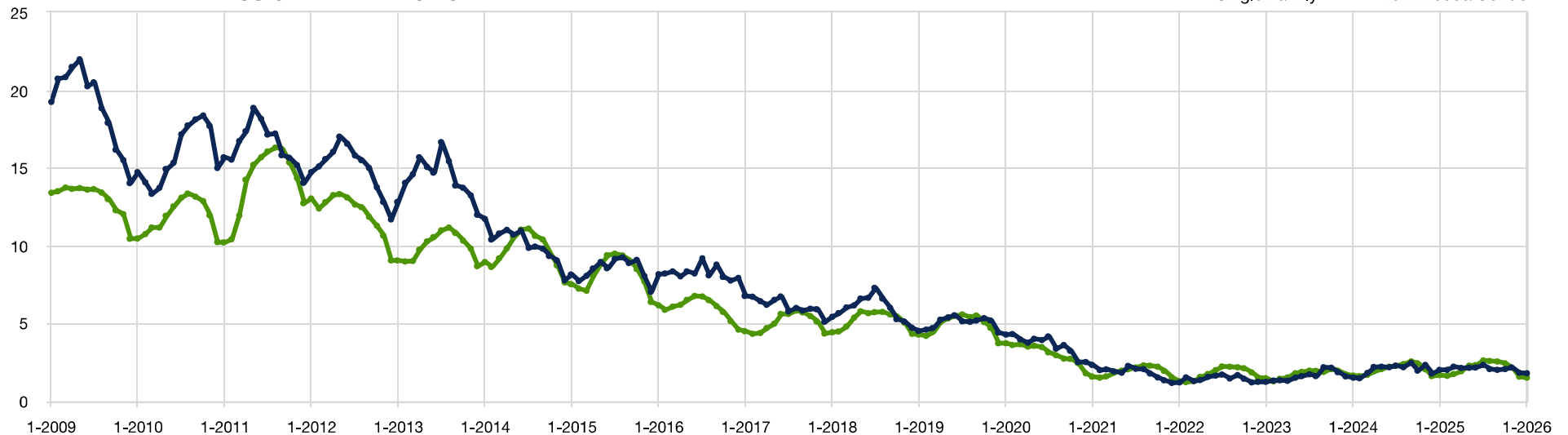
January



| Months Supply | Single Family | Year-Over-Year Change | Townhouse / Condo | Year-Over-Year Change |
|-----------------|---------------|-----------------------|-------------------|-----------------------|
| Feb-2025 | 1.6 | 0.0% | 2.0 | + 33.3% |
| Mar-2025 | 1.7 | 0.0% | 2.2 | + 22.2% |
| Apr-2025 | 1.9 | 0.0% | 2.1 | - 4.5% |
| May-2025 | 2.3 | + 9.5% | 2.1 | - 4.5% |
| Jun-2025 | 2.3 | + 4.5% | 2.2 | 0.0% |
| Jul-2025 | 2.6 | + 13.0% | 2.3 | 0.0% |
| Aug-2025 | 2.6 | + 8.3% | 2.1 | - 4.5% |
| Sep-2025 | 2.6 | 0.0% | 2.0 | - 20.0% |
| Oct-2025 | 2.4 | 0.0% | 2.1 | + 5.0% |
| Nov-2025 | 2.2 | + 10.0% | 2.2 | - 4.3% |
| Dec-2025 | 1.6 | 0.0% | 1.8 | 0.0% |
| Jan-2026 | 1.5 | - 11.8% | 1.8 | - 10.0% |
| 12-Month Avg* | 2.1 | + 3.6% | 2.1 | + 0.0% |

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

Historical Months Supply of Inventory by Month



All Residential Properties Market Overview

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



| Key Metrics | Historical Sparkbars | 1-2025 | 1-2026 | % Change | YTD 2025 | YTD 2026 | % Change |
|---------------------------------------|----------------------|-----------|------------------|----------|-----------|------------------|----------|
| New Listings | | 272 | 253 | - 7.0% | 272 | 253 | - 7.0% |
| Pending Sales | | 204 | 206 | + 1.0% | 204 | 206 | + 1.0% |
| Closed Sales | | 225 | 203 | - 9.8% | 225 | 203 | - 9.8% |
| Days on Market Until Sale | | 39 | 34 | - 12.8% | 39 | 34 | - 12.8% |
| Median Sales Price | | \$339,000 | \$360,000 | + 6.2% | \$339,000 | \$360,000 | + 6.2% |
| Average Sales Price | | \$403,932 | \$440,992 | + 9.2% | \$403,932 | \$440,992 | + 9.2% |
| Percent of List Price Received | | 100.0% | 100.4% | + 0.4% | 100.0% | 100.4% | + 0.4% |
| Housing Affordability Index | | 114 | 116 | + 1.8% | 114 | 116 | + 1.8% |
| Inventory of Homes for Sale | | 482 | 441 | - 8.5% | — | — | — |
| Months Supply of Inventory | | 1.7 | 1.5 | - 11.8% | — | — | — |