

# Monthly Indicators



## July 2025

U.S. existing-home sales fell 2.7% from the previous month to a seasonally adjusted annual rate of 3.93 million, according to the National Association of REALTORS® (NAR). Sales were unchanged from one year earlier. Regionally, monthly sales declined in the Midwest, Northeast, and South but rose in the West. Year-over-year, sales decreased in the Northeast and West but increased in the South and Midwest.

Closed Sales increased 1.4 percent for Existing Homes homes and 3.6 percent for New Construction homes. Pending Sales decreased 0.1 percent for Existing Homes homes and 7.6 percent for New Construction homes. Inventory increased 13.0 percent for Existing Homes homes and 0.4 percent for New Construction homes.

Median Sales Price increased 7.2 percent to \$325,000 for Existing Homes homes but decreased 3.7 percent to \$524,012 for New Construction homes. Days on Market increased 26.1 percent for Existing Homes homes but decreased 29.8 percent for New Construction homes. Months Supply of Inventory increased 9.1 percent for Existing Homes homes but decreased 1.9 percent for New Construction homes.

Nationally, the median existing-home sales price rose 2.0% year-over-year to \$435,300, a new monthly high and the 24th consecutive month of annual price gains, according to NAR. Slower sales activity has contributed to rising inventory this year, with 1.53 million properties listed for sale heading into July, a 15.9% increase from the same time last year and equivalent to a 4.7-month supply at the current sales pace.

## Quick Facts

|                                       |   |                                 |
|---------------------------------------|---|---------------------------------|
| + 1.6%                                | + 8.2%                                    | + 8.0%                          |
| Change in<br>Closed Sales<br>Combined | Change in<br>Avg. Sales Price<br>Combined | Change in<br>Supply<br>Combined |

Residential real estate activity in the Kansas counties of Atchison, Douglas, Franklin, Jefferson, Johnson, Leavenworth, Linn, Miami and Wyandotte and the Missouri counties of Bates, Buchanan, Cass, Clay, Clinton, Jackson, Johnson, Lafayette, Platte and Ray. Percent changes are calculated using rounded figures.

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# Existing Homes Market Overview

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



| Key Metrics                  | Historical Sparkbars | 7-2024    | 7-2025           | % Change | YTD 2024  | YTD 2025         | % Change |
|------------------------------|----------------------|-----------|------------------|----------|-----------|------------------|----------|
| Closed Sales                 |                      | 3,314     | <b>3,361</b>     | + 1.4%   | 19,179    | <b>19,588</b>    | + 2.1%   |
| Average Sales Price          |                      | \$347,816 | <b>\$381,269</b> | + 9.6%   | \$332,208 | <b>\$361,808</b> | + 8.9%   |
| Median Sales Price           |                      | \$303,210 | <b>\$325,000</b> | + 7.2%   | \$285,125 | <b>\$305,000</b> | + 7.0%   |
| Days on Market Until Sale    |                      | 23        | <b>29</b>        | + 26.1%  | 30        | <b>35</b>        | + 16.7%  |
| Pct. of Orig. Price Received |                      | 98.4%     | <b>97.7%</b>     | - 0.7%   | 98.2%     | <b>97.8%</b>     | - 0.4%   |
| Pending Sales                |                      | 3,005     | <b>3,003</b>     | - 0.1%   | 20,503    | <b>21,058</b>    | + 2.7%   |
| Inventory                    |                      | 5,962     | <b>6,739</b>     | + 13.0%  | —         | —                | —        |
| Supply                       |                      | 2.2       | <b>2.4</b>       | + 9.1%   | —         | —                | —        |

# New Homes Market Overview

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



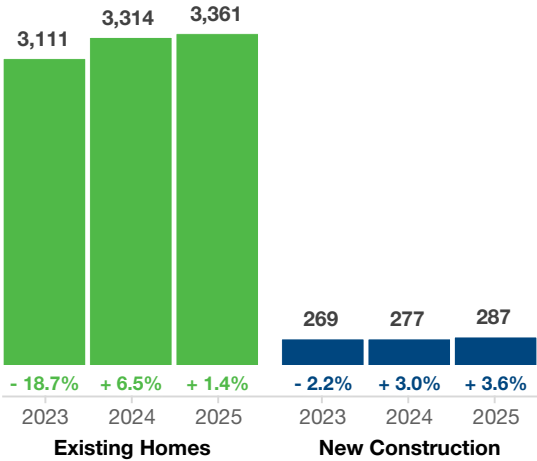
| Key Metrics                  | Historical Sparkbars | 7-2024    | 7-2025    | % Change | YTD 2024  | YTD 2025  | % Change |
|------------------------------|----------------------|-----------|-----------|----------|-----------|-----------|----------|
| Closed Sales                 |                      | 277       | 287       | + 3.6%   | 1,897     | 1,931     | + 1.8%   |
| Average Sales Price          |                      | \$603,786 | \$590,912 | - 2.1%   | \$584,176 | \$576,334 | - 1.3%   |
| Median Sales Price           |                      | \$543,948 | \$524,012 | - 3.7%   | \$530,500 | \$500,990 | - 5.6%   |
| Days on Market Until Sale    |                      | 141       | 99        | - 29.8%  | 152       | 119       | - 21.7%  |
| Pct. of Orig. Price Received |                      | 100.9%    | 100.3%    | - 0.6%   | 100.3%    | 100.5%    | + 0.2%   |
| Pending Sales                |                      | 277       | 256       | - 7.6%   | 2,272     | 2,043     | - 10.1%  |
| Inventory                    |                      | 1,430     | 1,436     | + 0.4%   | —         | —         | —        |
| Supply                       |                      | 5.4       | 5.3       | - 1.9%   | —         | —         | —        |

# Closed Sales

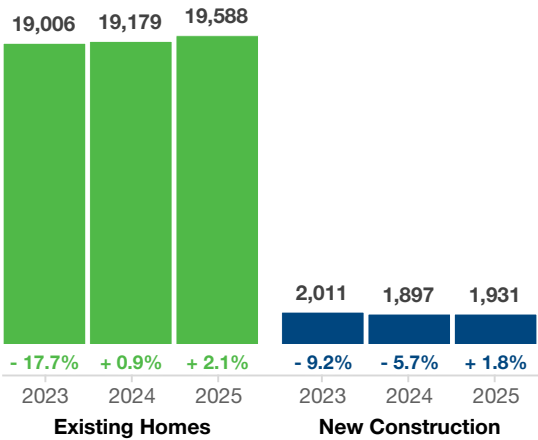
A count of the actual sales that closed in a given month.



## July

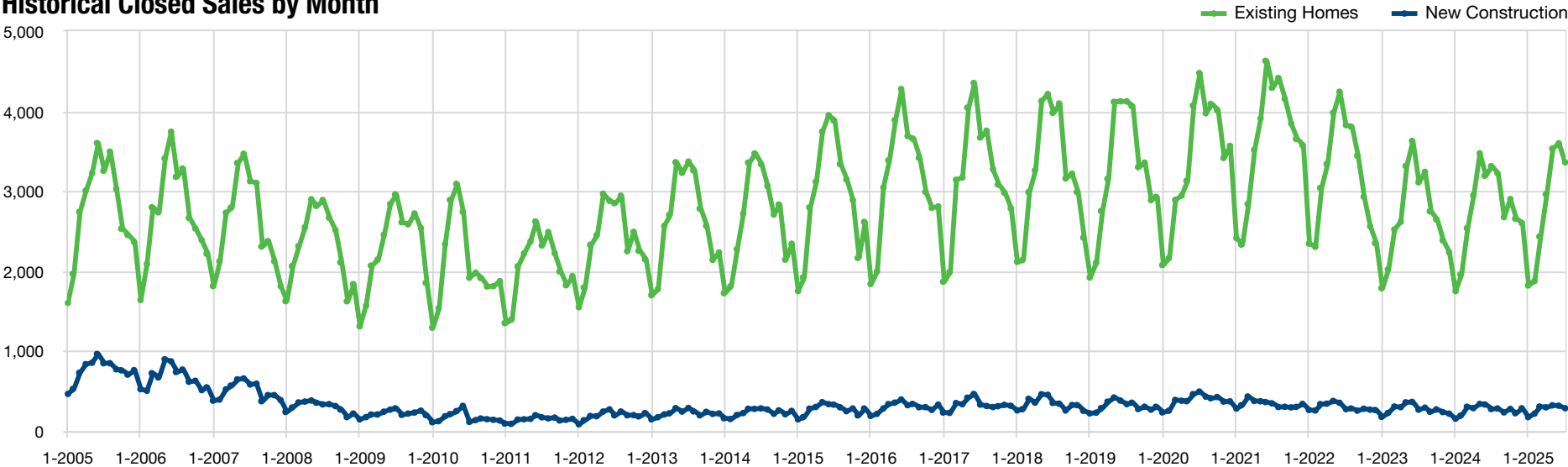


## Year to Date



| Closed Sales | Existing Homes | Year-Over-Year Change | New Construction | Year-Over-Year Change |
|--------------|----------------|-----------------------|------------------|-----------------------|
| Aug-2024     | 3,224          | - 0.6%                | 284              | - 3.4%                |
| Sep-2024     | 2,676          | - 2.7%                | 235              | - 3.3%                |
| Oct-2024     | 2,902          | + 9.7%                | 278              | + 2.2%                |
| Nov-2024     | 2,657          | + 11.4%               | 225              | - 5.9%                |
| Dec-2024     | 2,604          | + 16.4%               | 286              | + 30.6%               |
| Jan-2025     | 1,822          | + 4.1%                | 176              | + 12.1%               |
| Feb-2025     | 1,877          | - 4.2%                | 220              | + 13.4%               |
| Mar-2025     | 2,434          | - 4.1%                | 308              | + 0.7%                |
| Apr-2025     | 2,962          | + 0.4%                | 298              | + 3.5%                |
| May-2025     | 3,533          | + 1.7%                | 323              | - 5.3%                |
| Jun-2025     | 3,599          | + 12.7%               | 319              | - 4.5%                |
| Jul-2025     | 3,361          | + 1.4%                | 287              | + 3.6%                |
| 12-Month Avg | 2,804          | + 3.7%                | 270              | + 2.3%                |

## Historical Closed Sales by Month



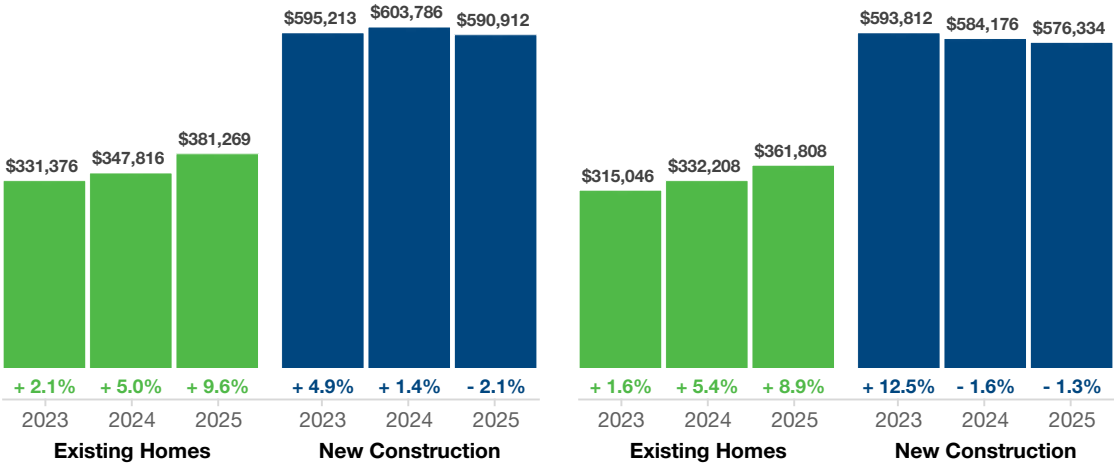
# Average Sales Price

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



## July

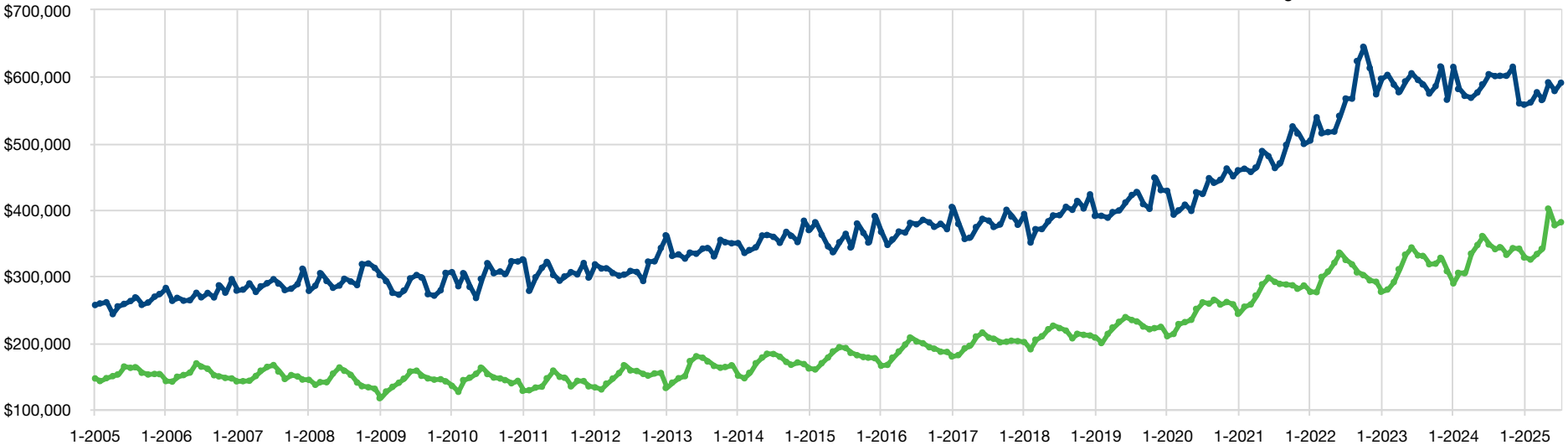
## Year to Date



| Avg. Sales Price | Existing Homes | Year-Over-Year Change | New Construction | Year-Over-Year Change |
|------------------|----------------|-----------------------|------------------|-----------------------|
| Aug-2024         | \$340,794      | + 3.1%                | \$600,962        | + 2.1%                |
| Sep-2024         | \$343,726      | + 8.0%                | \$601,413        | + 4.6%                |
| Oct-2024         | \$332,245      | + 4.2%                | \$601,481        | + 2.7%                |
| Nov-2024         | \$342,254      | + 4.5%                | \$614,945        | - 0.1%                |
| Dec-2024         | \$341,399      | + 11.0%               | \$559,934        | - 1.0%                |
| Jan-2025         | \$328,286      | + 13.5%               | \$558,005        | - 9.2%                |
| Feb-2025         | \$325,122      | + 6.6%                | \$561,297        | - 3.5%                |
| Mar-2025         | \$333,420      | + 9.5%                | \$576,639        | + 0.9%                |
| Apr-2025         | \$341,278      | + 2.2%                | \$565,040        | - 0.6%                |
| May-2025         | \$401,673      | + 15.8%               | \$591,538        | + 2.6%                |
| Jun-2025         | \$376,741      | + 4.5%                | \$578,562        | - 1.7%                |
| Jul-2025         | \$381,269      | + 9.6%                | \$590,912        | - 2.1%                |
| 12-Month Avg*    | \$352,690      | + 7.6%                | \$583,686        | - 0.2%                |

\* Avg. Sales Price for all properties from August 2024 through July 2025. This is not the average of the individual figures above.

## Historical Average Sales Price by Month



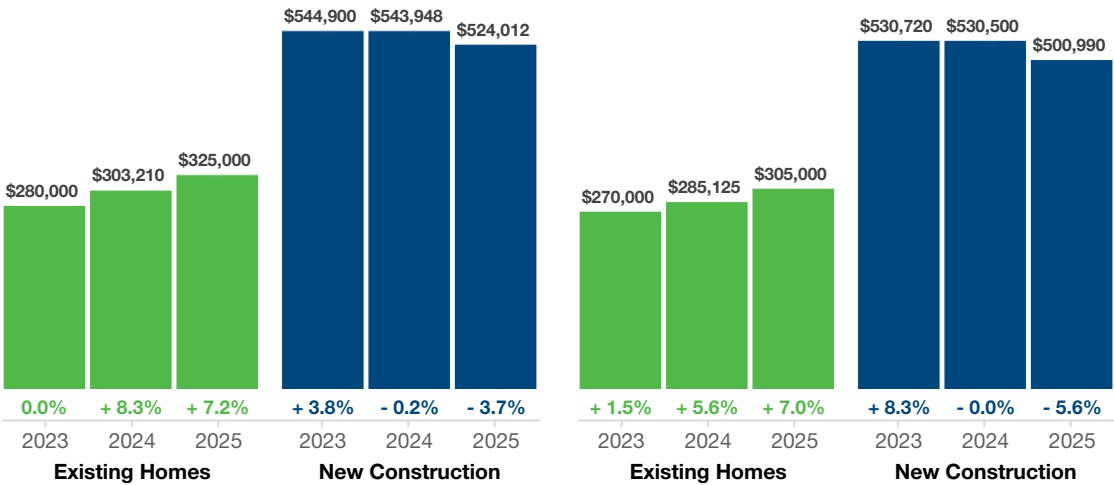
# Median Sales Price

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



## July

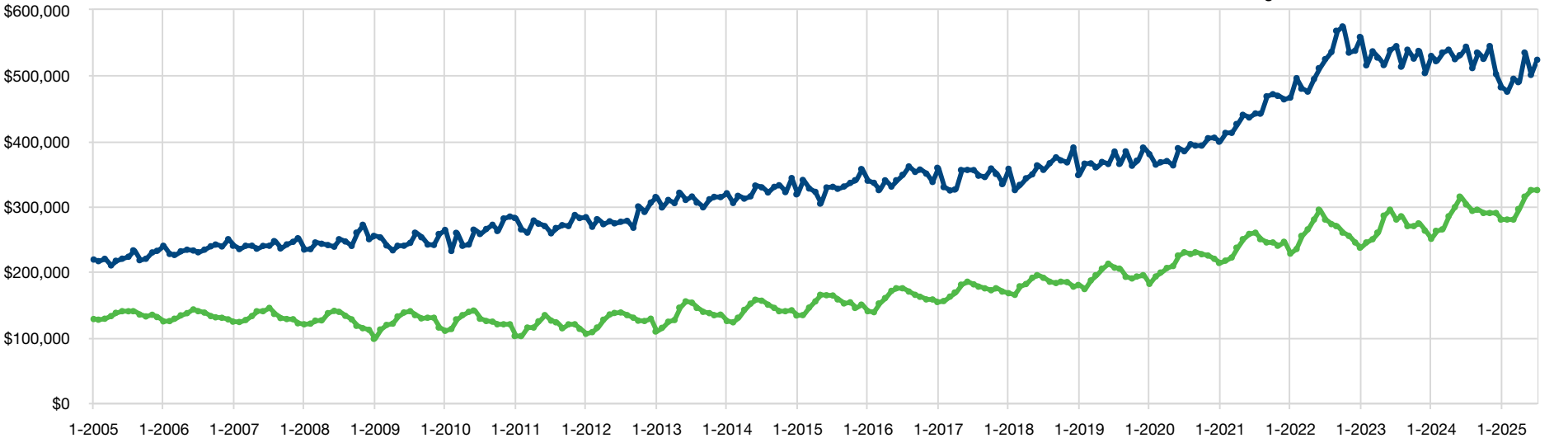
## Year to Date



| Median Sales Price | Existing Homes | Year-Over-Year Change | New Construction | Year-Over-Year Change |
|--------------------|----------------|-----------------------|------------------|-----------------------|
| Aug-2024           | \$293,250      | + 2.9%                | \$511,400        | - 0.4%                |
| Sep-2024           | \$295,000      | + 9.3%                | \$535,000        | - 0.8%                |
| Oct-2024           | \$290,000      | + 7.4%                | \$525,456        | - 0.1%                |
| Nov-2024           | \$289,975      | + 5.8%                | \$545,000        | + 1.4%                |
| Dec-2024           | \$290,000      | + 10.3%               | \$502,195        | - 0.3%                |
| Jan-2025           | \$279,900      | + 11.7%               | \$482,068        | - 9.0%                |
| Feb-2025           | \$280,000      | + 6.6%                | \$475,343        | - 8.9%                |
| Mar-2025           | \$279,950      | + 5.6%                | \$495,000        | - 7.5%                |
| Apr-2025           | \$296,000      | + 3.9%                | \$489,925        | - 9.2%                |
| May-2025           | \$315,000      | + 5.4%                | \$535,000        | + 1.9%                |
| Jun-2025           | \$325,000      | + 3.2%                | \$500,990        | - 5.7%                |
| Jul-2025           | \$325,000      | + 7.2%                | \$524,012        | - 3.7%                |
| 12-Month Avg*      | \$300,000      | + 7.1%                | \$509,383        | - 3.9%                |

\* Median Sales Price for all properties from August 2024 through July 2025. This is not the average of the individual figures above.

## Historical Median Sales Price by Month



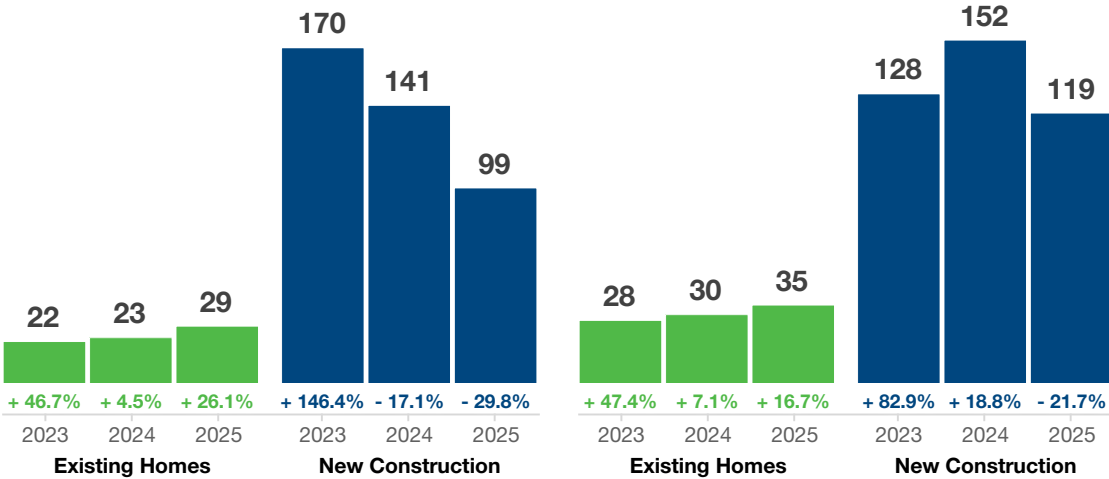
# Days on Market Until Sale

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



## July

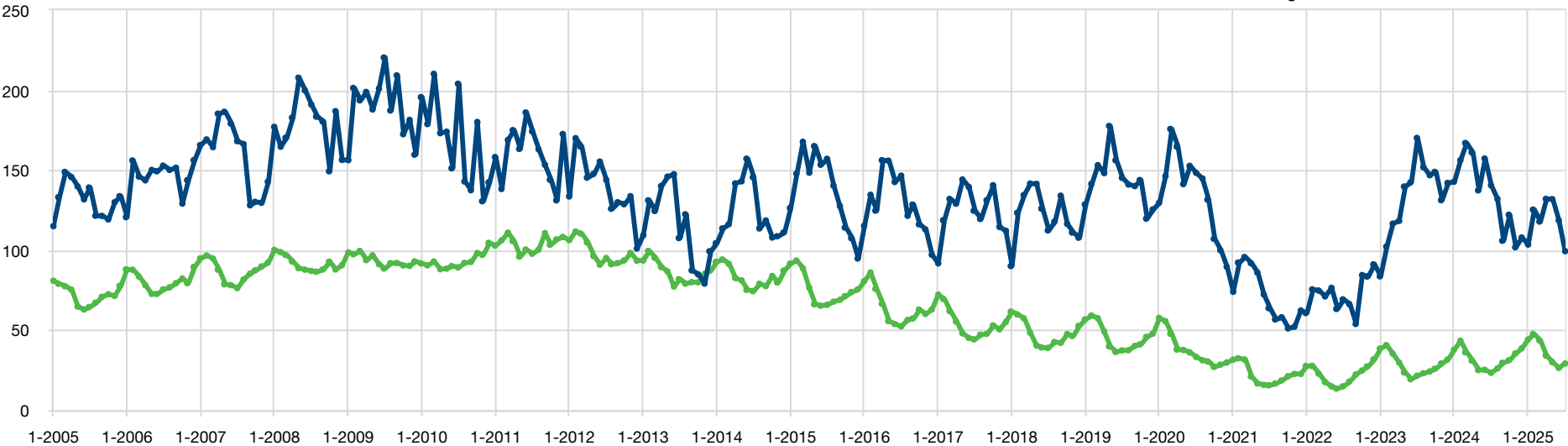
## Year to Date



| Days on Market | Existing Homes | Year-Over-Year Change | New Construction | Year-Over-Year Change |
|----------------|----------------|-----------------------|------------------|-----------------------|
| Aug-2024       | 26             | + 13.0%               | 132              | - 13.2%               |
| Sep-2024       | 30             | + 25.0%               | 106              | - 27.9%               |
| Oct-2024       | 31             | + 19.2%               | 122              | - 18.1%               |
| Nov-2024       | 35             | + 20.7%               | 102              | - 22.1%               |
| Dec-2024       | 39             | + 21.9%               | 108              | - 23.9%               |
| Jan-2025       | 44             | + 15.8%               | 104              | - 27.3%               |
| Feb-2025       | 48             | + 11.6%               | 125              | - 19.9%               |
| Mar-2025       | 44             | + 22.2%               | 118              | - 29.3%               |
| Apr-2025       | 34             | + 9.7%                | 132              | - 18.0%               |
| May-2025       | 30             | + 20.0%               | 132              | - 3.6%                |
| Jun-2025       | 26             | + 4.0%                | 119              | - 24.2%               |
| Jul-2025       | 29             | + 26.1%               | 99               | - 29.8%               |
| 12-Month Avg*  | 33             | + 16.6%               | 118              | - 21.2%               |

\* Days on Market for all properties from August 2024 through July 2025. This is not the average of the individual figures above.

## Historical Days on Market Until Sale by Month



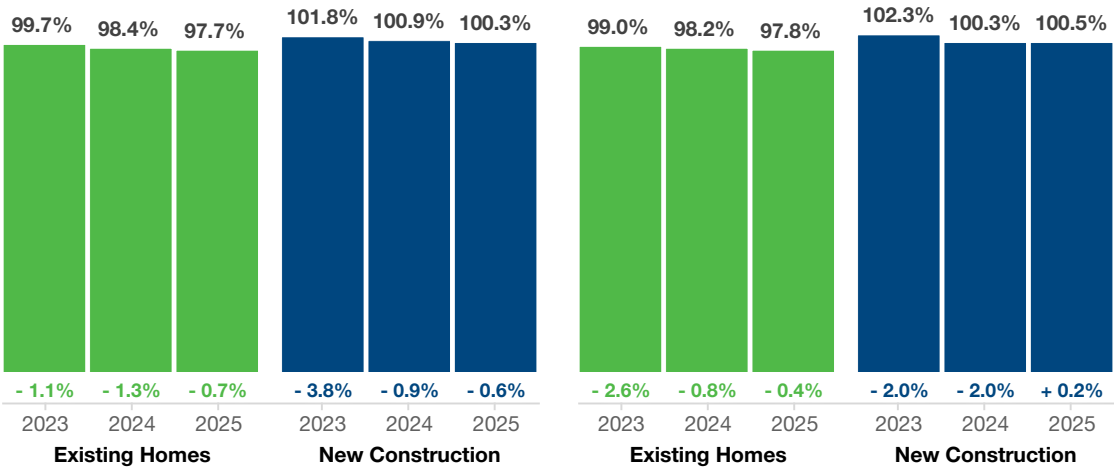
# Percentage of Original List Price Received

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.



## July

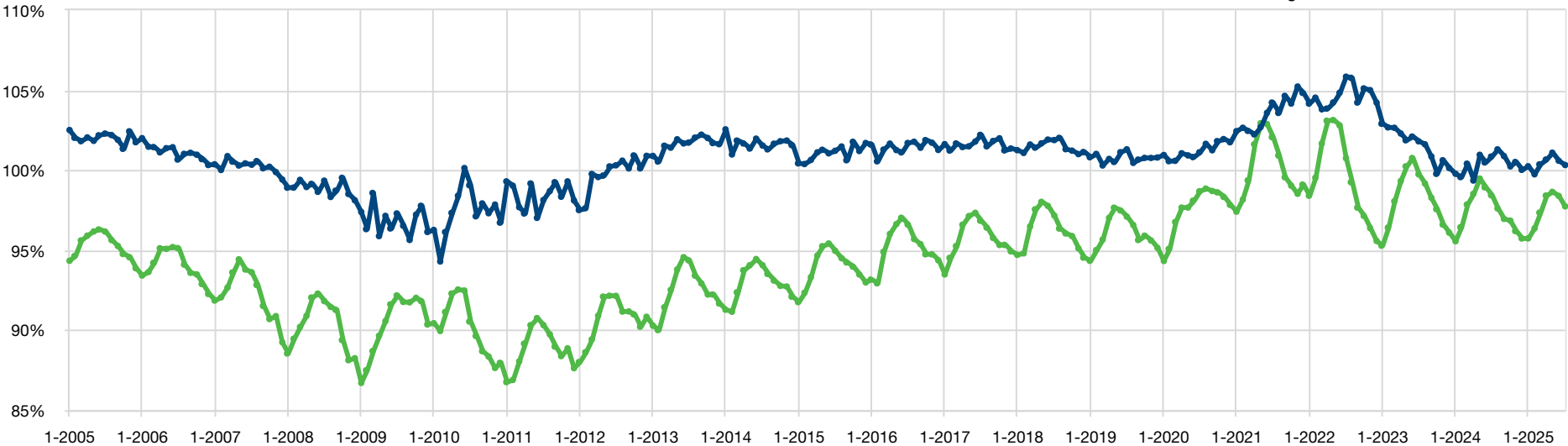
## Year to Date



| Pct. of Orig. Price Received | Existing Homes | Year-Over-Year Change | New Construction | Year-Over-Year Change |
|------------------------------|----------------|-----------------------|------------------|-----------------------|
| Aug-2024                     | 97.6%          | - 1.6%                | 101.3%           | - 0.3%                |
| Sep-2024                     | 97.0%          | - 1.3%                | 100.9%           | 0.0%                  |
| Oct-2024                     | 96.8%          | - 0.8%                | 100.2%           | + 0.4%                |
| Nov-2024                     | 96.2%          | - 0.4%                | 100.5%           | - 0.1%                |
| Dec-2024                     | 95.7%          | - 0.4%                | 100.0%           | - 0.1%                |
| Jan-2025                     | 95.7%          | + 0.1%                | 100.2%           | + 0.4%                |
| Feb-2025                     | 96.4%          | 0.0%                  | 99.7%            | + 0.1%                |
| Mar-2025                     | 97.3%          | - 0.6%                | 100.4%           | 0.0%                  |
| Apr-2025                     | 98.4%          | - 0.1%                | 100.7%           | + 1.3%                |
| May-2025                     | 98.6%          | - 0.9%                | 101.1%           | + 0.1%                |
| Jun-2025                     | 98.4%          | - 0.5%                | 100.6%           | + 0.1%                |
| Jul-2025                     | 97.7%          | - 0.7%                | 100.3%           | - 0.6%                |
| 12-Month Avg*                | 97.3%          | - 0.7%                | 100.5%           | + 0.1%                |

\* Pct. of Orig. Price Received for all properties from August 2024 through July 2025. This is not the average of the individual figures above.

## Historical Percentage of Original List Price Received by Month



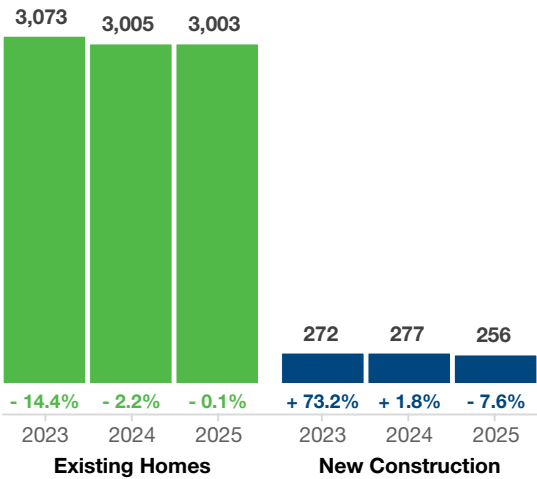


# Pending Sales

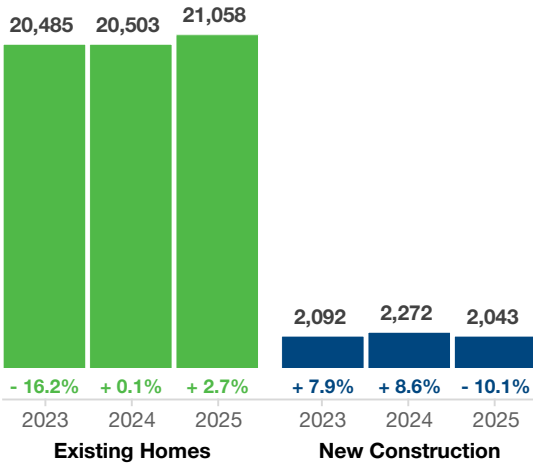
A count of the properties on which offers have been accepted in a given month.



## July

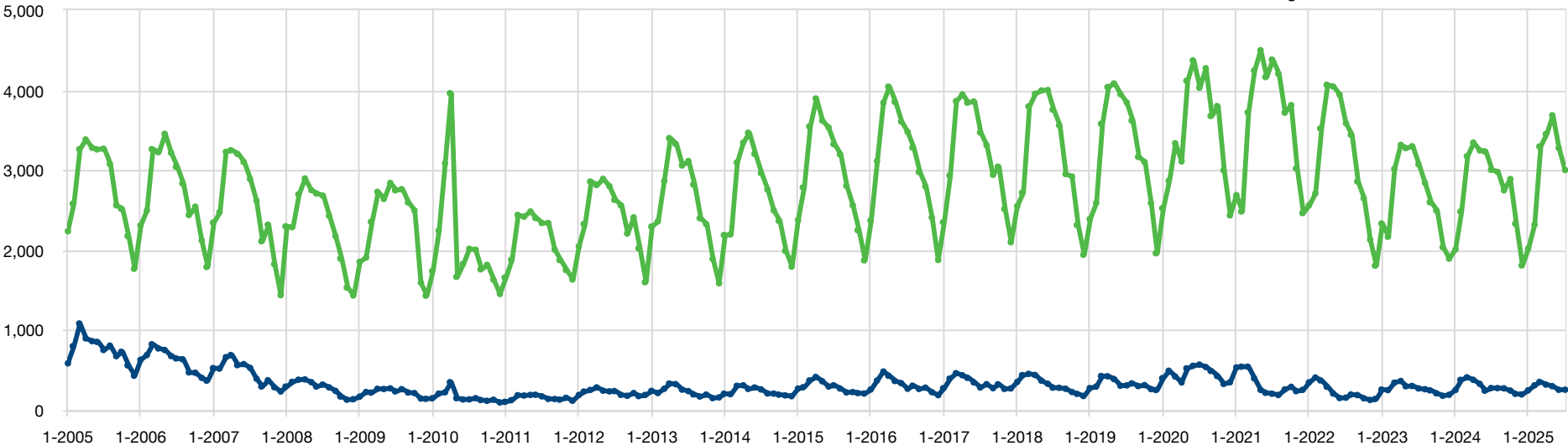


## Year to Date



| Pending Sales | Existing Homes | Year-Over-Year Change | New Construction | Year-Over-Year Change |
|---------------|----------------|-----------------------|------------------|-----------------------|
| Aug-2024      | 2,979          | + 4.8%                | 276              | + 5.3%                |
| Sep-2024      | 2,749          | + 5.7%                | 273              | + 10.1%               |
| Oct-2024      | 2,890          | + 15.7%               | 245              | + 16.1%               |
| Nov-2024      | 2,332          | + 14.4%               | 204              | + 13.3%               |
| Dec-2024      | 1,810          | - 4.5%                | 197              | + 2.1%                |
| Jan-2025      | 2,022          | + 0.6%                | 248              | - 2.0%                |
| Feb-2025      | 2,318          | - 6.7%                | 311              | - 17.9%               |
| Mar-2025      | 3,297          | + 3.8%                | 353              | - 14.1%               |
| Apr-2025      | 3,453          | + 3.2%                | 320              | - 15.6%               |
| May-2025      | 3,687          | + 13.5%               | 300              | - 8.8%                |
| Jun-2025      | 3,278          | + 1.3%                | 255              | + 4.5%                |
| Jul-2025      | 3,003          | - 0.1%                | 256              | - 7.6%                |
| 12-Month Avg  | 2,818          | + 4.4%                | 270              | - 3.9%                |

## Historical Pending Sales by Month

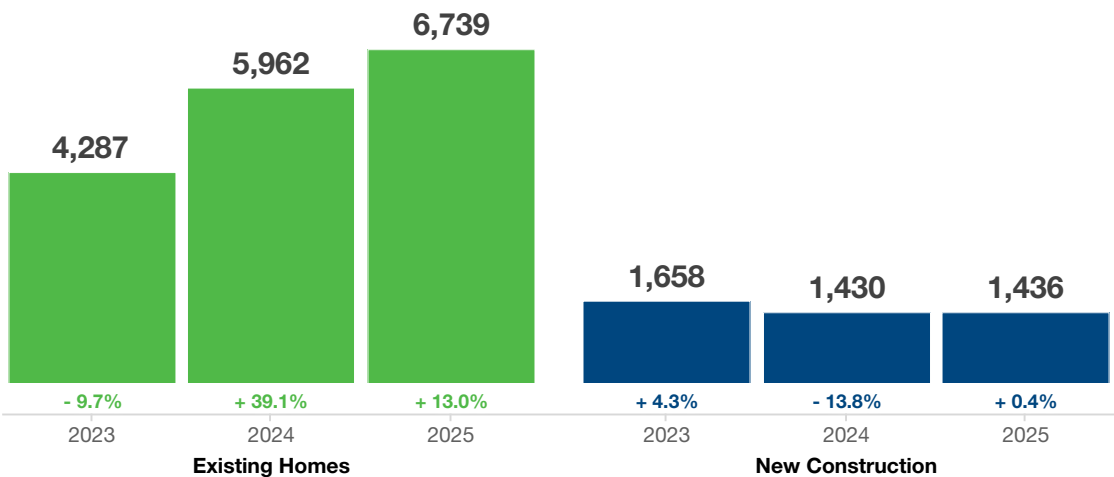


# Inventory

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

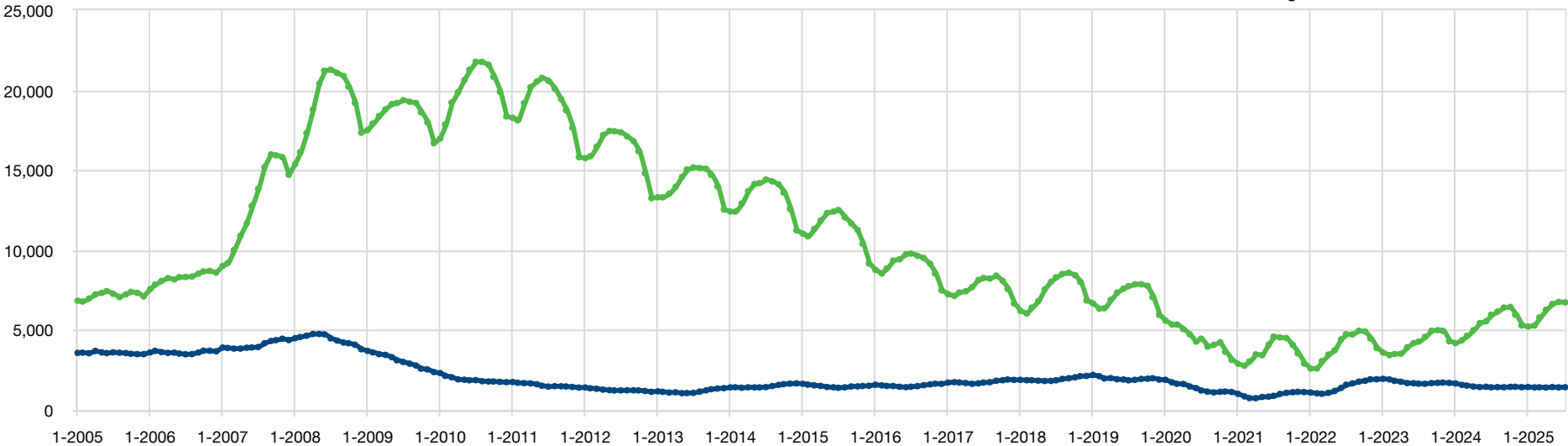


## July



| Inventory    | Existing Homes | Year-Over-Year Change | New Construction | Year-Over-Year Change |
|--------------|----------------|-----------------------|------------------|-----------------------|
| Aug-2024     | 6,164          | + 34.6%               | 1,444            | - 12.5%               |
| Sep-2024     | 6,416          | + 29.3%               | 1,435            | - 15.2%               |
| Oct-2024     | 6,453          | + 28.9%               | 1,457            | - 14.7%               |
| Nov-2024     | 5,970          | + 20.2%               | 1,462            | - 15.3%               |
| Dec-2024     | 5,294          | + 22.7%               | 1,438            | - 15.6%               |
| Jan-2025     | 5,227          | + 24.8%               | 1,450            | - 13.2%               |
| Feb-2025     | 5,292          | + 21.0%               | 1,424            | - 9.9%                |
| Mar-2025     | 5,797          | + 24.7%               | 1,433            | - 6.7%                |
| Apr-2025     | 6,273          | + 25.5%               | 1,415            | - 4.3%                |
| May-2025     | 6,637          | + 22.0%               | 1,449            | + 0.2%                |
| Jun-2025     | 6,769          | + 21.7%               | 1,426            | - 2.7%                |
| Jul-2025     | 6,739          | + 13.0%               | 1,436            | + 0.4%                |
| 12-Month Avg | 6,086          | + 23.8%               | 1,439            | - 9.6%                |

## Historical Inventory by Month

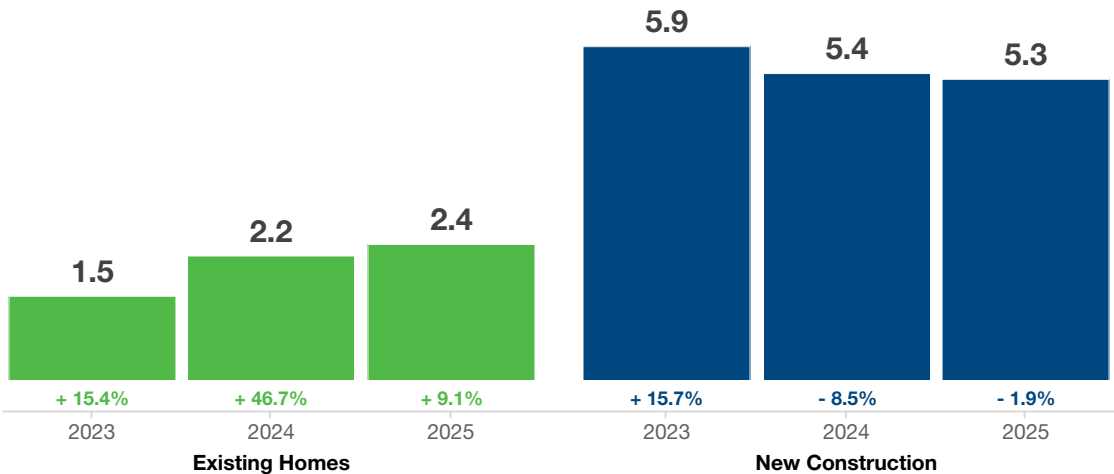


# Supply

The inventory of homes for sale at the end of a given month, divided by the average monthly closed sales from the last 12 months.



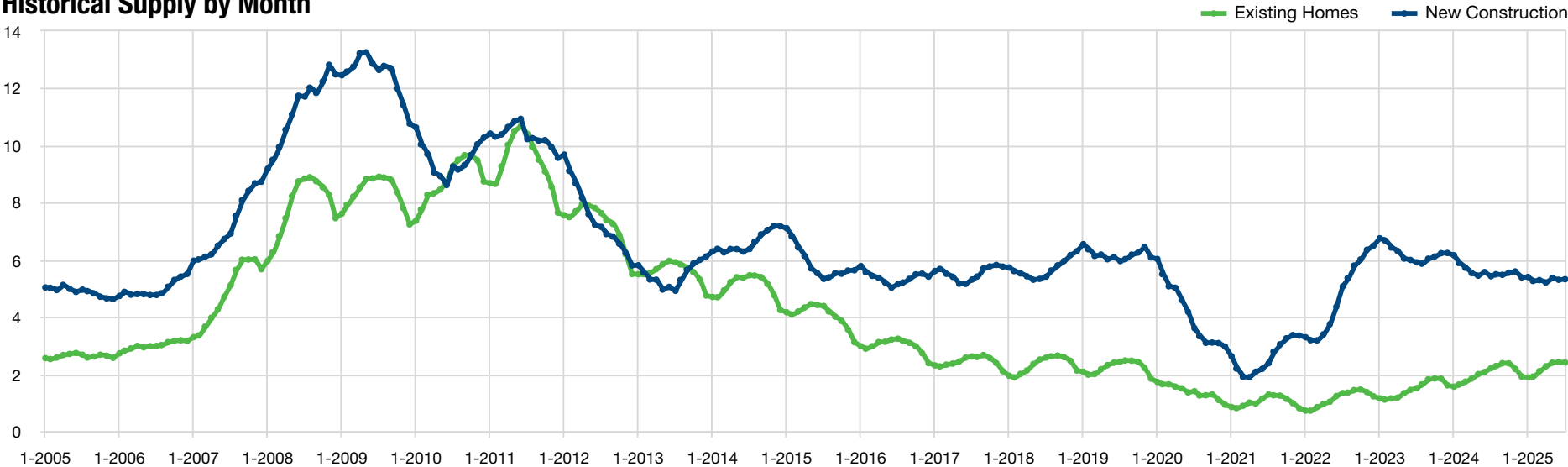
## July



| Supply        | Existing Homes | Year-Over-Year Change | New Construction | Year-Over-Year Change |
|---------------|----------------|-----------------------|------------------|-----------------------|
| Aug-2024      | 2.3            | + 43.8%               | 5.5              | - 6.8%                |
| Sep-2024      | 2.4            | + 33.3%               | 5.5              | - 8.3%                |
| Oct-2024      | 2.4            | + 33.3%               | 5.5              | - 9.8%                |
| Nov-2024      | 2.2            | + 22.2%               | 5.6              | - 9.7%                |
| Dec-2024      | 1.9            | + 18.8%               | 5.4              | - 12.9%               |
| Jan-2025      | 1.9            | + 18.8%               | 5.4              | - 12.9%               |
| Feb-2025      | 1.9            | + 18.8%               | 5.3              | - 10.2%               |
| Mar-2025      | 2.1            | + 23.5%               | 5.3              | - 7.0%                |
| Apr-2025      | 2.3            | + 27.8%               | 5.2              | - 5.5%                |
| May-2025      | 2.4            | + 20.0%               | 5.4              | 0.0%                  |
| Jun-2025      | 2.4            | + 14.3%               | 5.3              | - 5.4%                |
| Jul-2025      | 2.4            | + 9.1%                | 5.3              | - 1.9%                |
| 12-Month Avg* | 2.2            | + 21.7%               | 5.4              | - 8.0%                |

\* Supply for all properties from August 2024 through July 2025. This is not the average of the individual figures above.

## Historical Supply by Month



# New and Existing Homes Combined Activity Overview

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



| Key Metrics                  | Historical Sparkbars | 7-2024    | 7-2025    | % Change | YTD 2024  | YTD 2025  | % Change |
|------------------------------|----------------------|-----------|-----------|----------|-----------|-----------|----------|
| Closed Sales                 |                      | 3,591     | 3,648     | + 1.6%   | 21,076    | 21,519    | + 2.1%   |
| Average Sales Price          |                      | \$367,600 | \$397,785 | + 8.2%   | \$354,928 | \$381,083 | + 7.4%   |
| Median Sales Price           |                      | \$319,000 | \$337,890 | + 5.9%   | \$304,325 | \$320,000 | + 5.2%   |
| Days on Market Until Sale    |                      | 32        | 35        | + 9.4%   | 41        | 42        | + 2.4%   |
| Pct. of Orig. Price Received |                      | 98.6%     | 97.9%     | - 0.7%   | 98.4%     | 98.0%     | - 0.4%   |
| Pending Sales                |                      | 3,282     | 3,259     | - 0.7%   | 22,775    | 23,101    | + 1.4%   |
| Inventory                    |                      | 7,392     | 8,175     | + 10.6%  | —         | —         | —        |
| Supply                       |                      | 2.5       | 2.7       | + 8.0%   | —         | —         | —        |