

Monthly Indicators



December 2025

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

Closed Sales increased 3.7 percent for Existing Homes homes but decreased 1.7 percent for New Construction homes. Pending Sales decreased 6.1 percent for Existing Homes homes but increased 14.7 percent for New Construction homes. Inventory increased 3.2 percent for Existing Homes homes and 1.5 percent for New Construction homes.

Median Sales Price increased 3.1 percent to \$299,000 for Existing Homes homes and 4.0 percent to \$519,804 for New Construction homes. Days on Market increased 10.3 percent for Existing Homes homes and 0.9 percent for New Construction homes. Months Supply of Inventory remained flat for Existing Homes homes but decreased 1.9 percent for New Construction properties.

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

Quick Facts

+ 3.2%	+ 2.2%	0.0%
Change in Closed Sales Combined	Change in Avg. Sales Price Combined	Change in Supply 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.


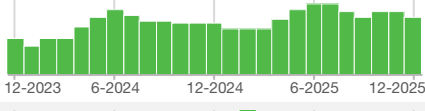
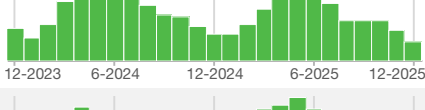
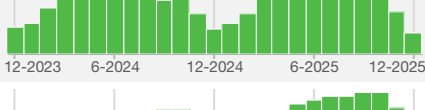
Existing Homes Market Overview	2
New Homes Market Overview	3
Closed Sales	4
Average Sales Price	5
Median Sales Price	6
Days on Market Until Sale	7
Percentage of Original List Price Received	8
Pending Sales	9
Inventory	10
Supply	11
New and Existing Homes Combined Activity Overview	12



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	12-2024	12-2025	% Change	YTD 2024	YTD 2025	% Change
Closed Sales		2,605	2,702	+ 3.7%	33,245	34,174	+ 2.8%
Average Sales Price		\$341,362	\$346,095	+ 1.4%	\$335,502	\$361,613	+ 7.8%
Median Sales Price		\$290,000	\$299,000	+ 3.1%	\$289,900	\$305,000	+ 5.2%
Days on Market Until Sale		39	43	+ 10.3%	31	35	+ 12.9%
Pct. of Orig. Price Received		95.7%	95.2%	- 0.5%	97.6%	97.1%	- 0.5%
Pending Sales		1,809	1,699	- 6.1%	33,258	34,242	+ 3.0%
Inventory		5,294	5,463	+ 3.2%	—	—	—
Supply		1.9	1.9	0.0%	—	—	—

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.



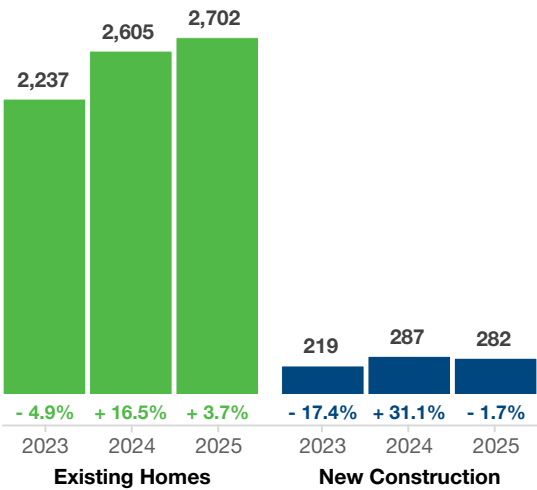
Key Metrics	Historical Sparkbars	12-2024	12-2025	% Change	YTD 2024	YTD 2025	% Change
Closed Sales		287	282	- 1.7%	3,206	3,331	+ 3.9%
Average Sales Price		\$559,678	\$609,710	+ 8.9%	\$588,377	\$591,032	+ 0.5%
Median Sales Price		\$500,000	\$519,804	+ 4.0%	\$529,000	\$510,000	- 3.6%
Days on Market Until Sale		108	109	+ 0.9%	137	114	- 16.8%
Pct. of Orig. Price Received		100.0%	100.4%	+ 0.4%	100.4%	100.4%	0.0%
Pending Sales		197	226	+ 14.7%	3,462	3,235	- 6.6%
Inventory		1,449	1,471	+ 1.5%	—	—	—
Supply		5.4	5.3	- 1.9%	—	—	—

Closed Sales

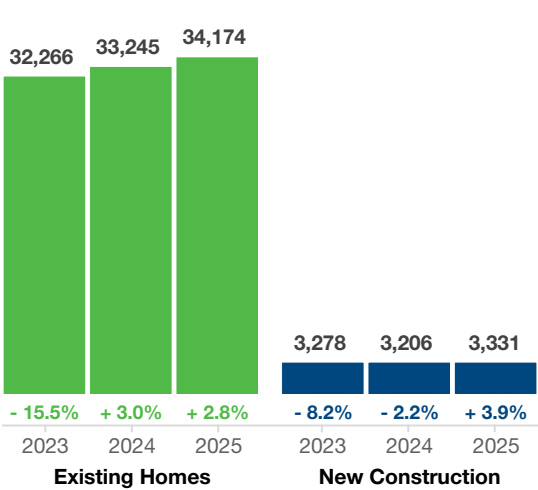
A count of the actual sales that closed in a given month.



December

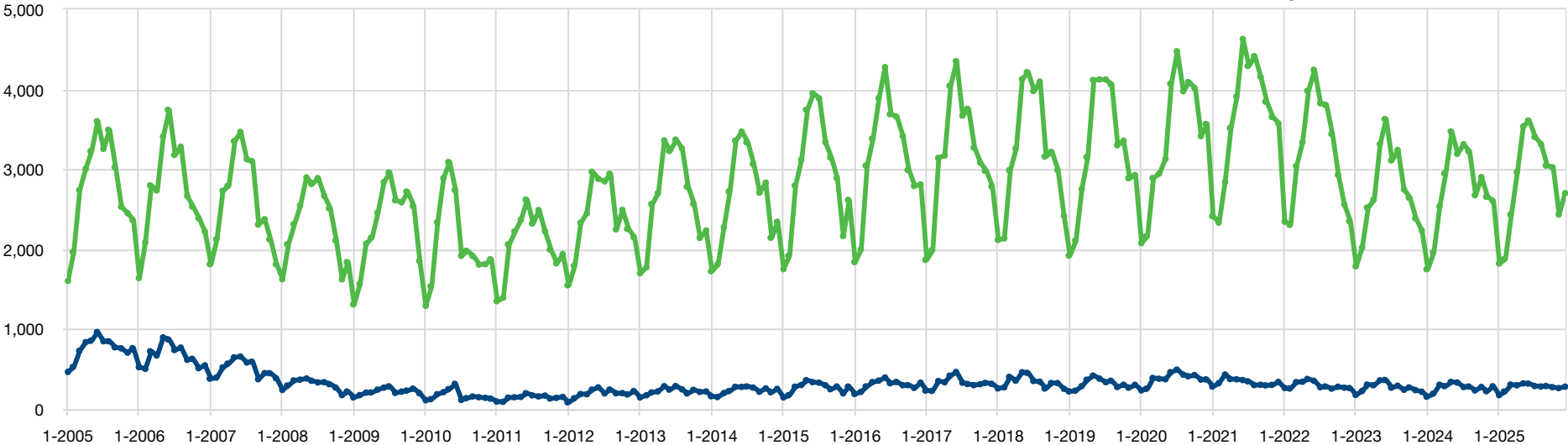


Year to Date



Closed Sales	Existing Homes	Year-Over-Year Change	New Construction	Year-Over-Year Change
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	2,964	+ 0.5%	299	+ 3.8%
May-2025	3,537	+ 1.8%	323	- 5.3%
Jun-2025	3,610	+ 13.0%	320	- 4.2%
Jul-2025	3,406	+ 2.8%	290	+ 4.7%
Aug-2025	3,314	+ 2.8%	284	0.0%
Sep-2025	3,047	+ 13.9%	290	+ 23.4%
Oct-2025	3,026	+ 4.2%	275	- 1.1%
Nov-2025	2,435	- 8.4%	264	+ 17.3%
Dec-2025	2,702	+ 3.7%	282	- 1.7%
12-Month Avg	2,848	+ 2.8%	278	+ 4.1%

Historical Closed Sales by Month



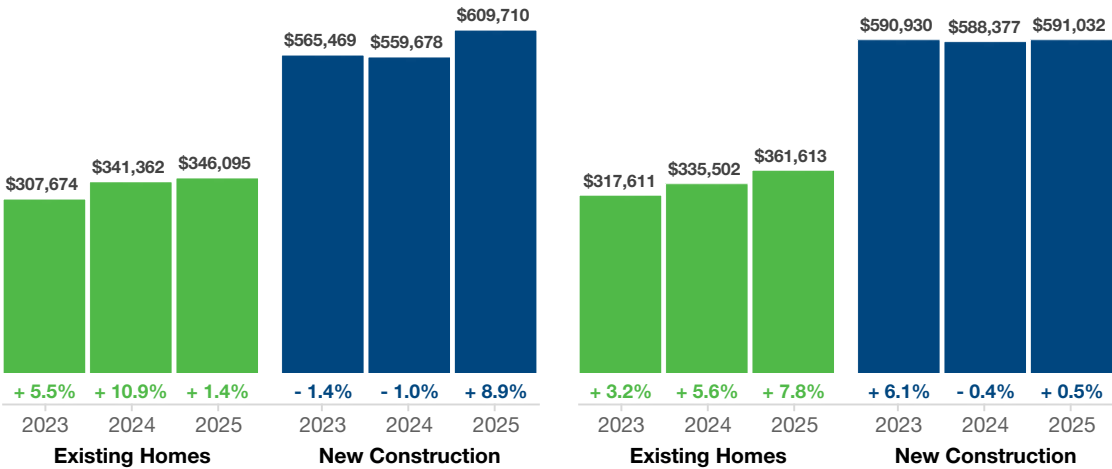
Average Sales Price

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



December

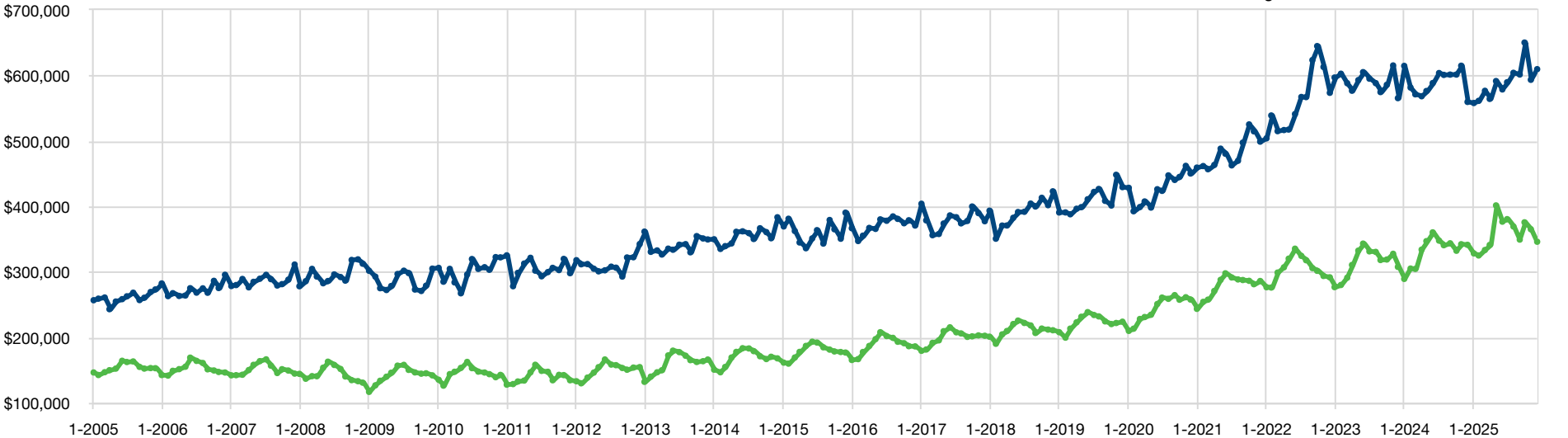
Year to Date



Avg. Sales Price	Existing Homes	Year-Over-Year Change	New Construction	Year-Over-Year Change
Jan-2025	\$328,286	+ 13.5%	\$558,005	- 9.2%
Feb-2025	\$325,122	+ 6.6%	\$561,297	- 3.5%
Mar-2025	\$333,461	+ 9.5%	\$576,639	+ 0.9%
Apr-2025	\$341,165	+ 2.1%	\$564,324	- 0.7%
May-2025	\$401,586	+ 15.7%	\$591,538	+ 2.6%
Jun-2025	\$376,747	+ 4.5%	\$578,769	- 1.7%
Jul-2025	\$380,611	+ 9.4%	\$589,746	- 2.3%
Aug-2025	\$369,368	+ 8.4%	\$604,153	+ 0.5%
Sep-2025	\$349,349	+ 1.6%	\$601,573	+ 0.0%
Oct-2025	\$375,736	+ 13.1%	\$650,341	+ 8.1%
Nov-2025	\$365,172	+ 6.7%	\$593,501	- 3.5%
Dec-2025	\$346,095	+ 1.4%	\$609,710	+ 8.9%
12-Month Avg*	\$361,613	+ 7.8%	\$591,032	+ 0.5%

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

Historical Average Sales Price by Month



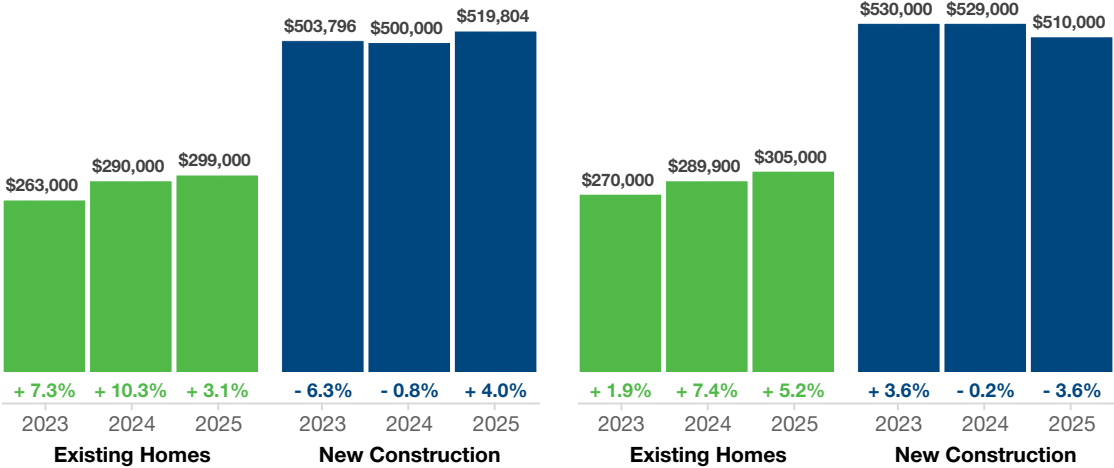
Median Sales Price

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



December

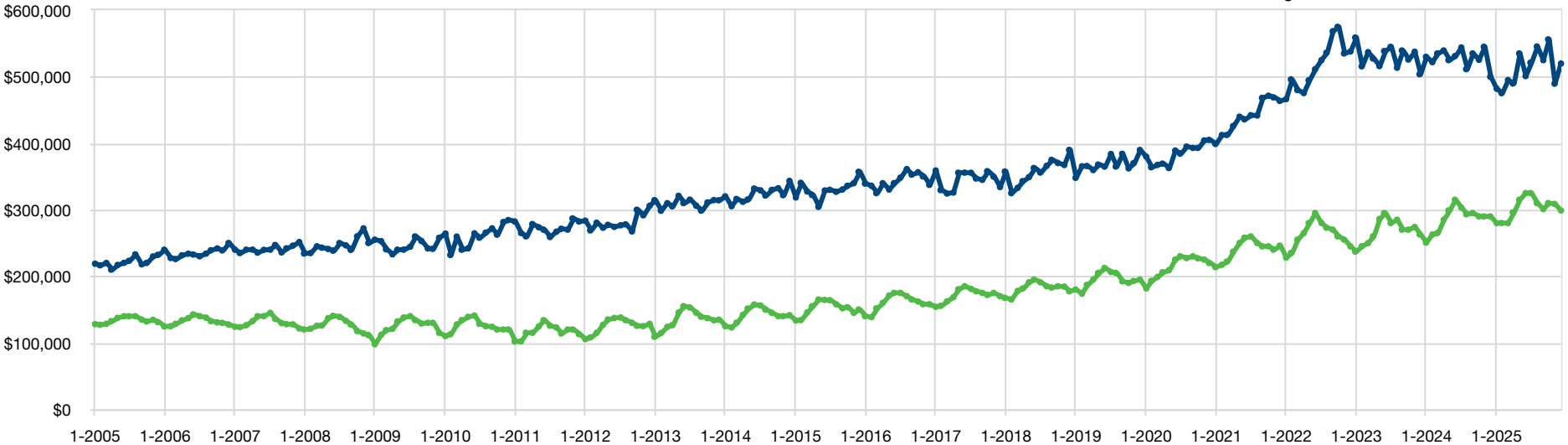
Year to Date



Median Sales Price	Existing Homes	Year-Over-Year Change	New Construction	Year-Over-Year Change
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%	\$489,900	- 9.2%
May-2025	\$315,000	+ 5.4%	\$535,000	+ 1.9%
Jun-2025	\$325,000	+ 3.2%	\$500,995	- 5.7%
Jul-2025	\$325,000	+ 7.2%	\$521,194	- 4.2%
Aug-2025	\$310,000	+ 5.7%	\$545,444	+ 6.7%
Sep-2025	\$301,000	+ 2.0%	\$525,000	- 1.9%
Oct-2025	\$310,000	+ 6.9%	\$556,150	+ 5.8%
Nov-2025	\$308,750	+ 6.5%	\$489,583	- 10.2%
Dec-2025	\$299,000	+ 3.1%	\$519,804	+ 4.0%
12-Month Avg*	\$305,000	+ 5.2%	\$510,000	- 3.6%

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

Historical Median Sales Price by Month



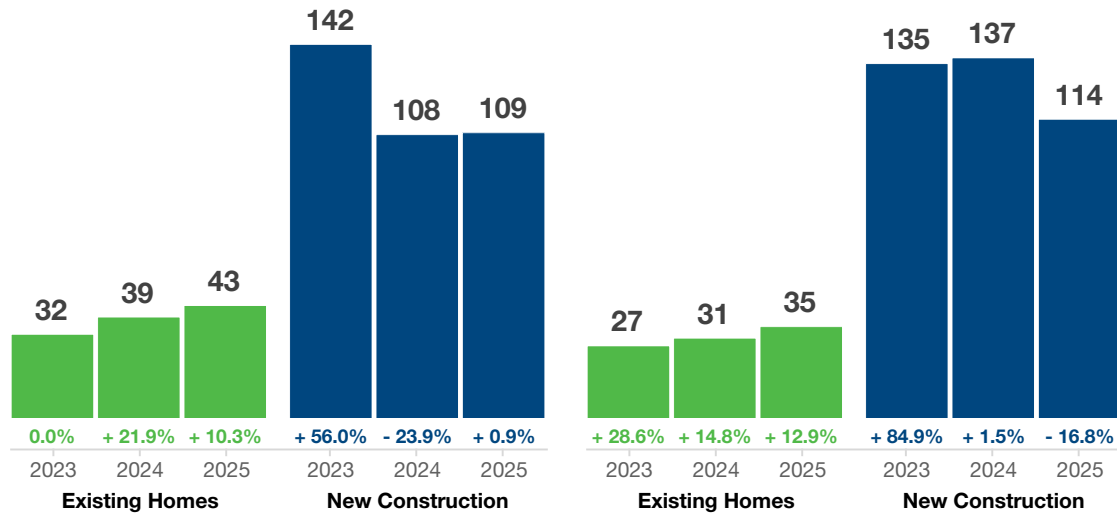
Days on Market Until Sale

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



December

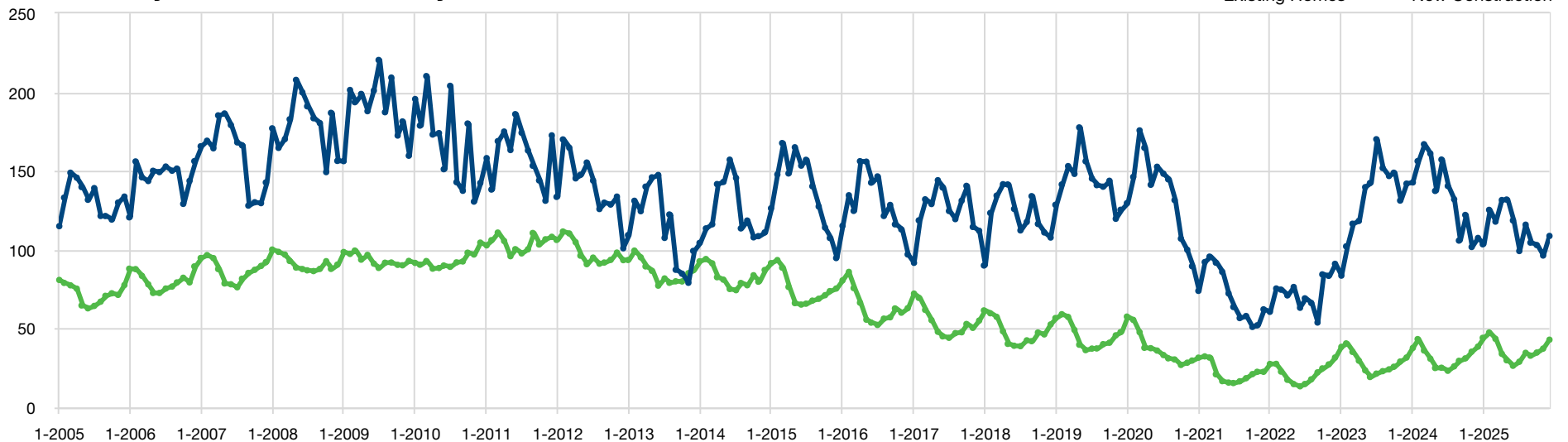
Year to Date



Days on Market	Existing Homes	Year-Over-Year Change	New Construction	Year-Over-Year Change
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%
Aug-2025	35	+ 34.6%	116	- 12.1%
Sep-2025	33	+ 10.0%	105	- 0.9%
Oct-2025	35	+ 12.9%	103	- 15.6%
Nov-2025	37	+ 5.7%	96	- 5.9%
Dec-2025	43	+ 10.3%	109	+ 0.9%
12-Month Avg*	35	+ 14.0%	114	- 16.9%

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

Historical Days on Market Until Sale by Month



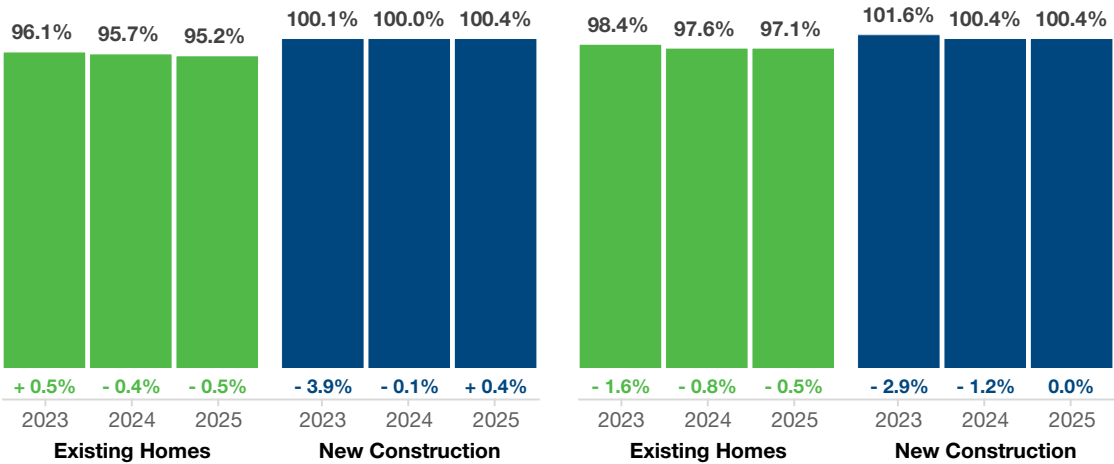
Percentage of Original List Price Received

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.



December

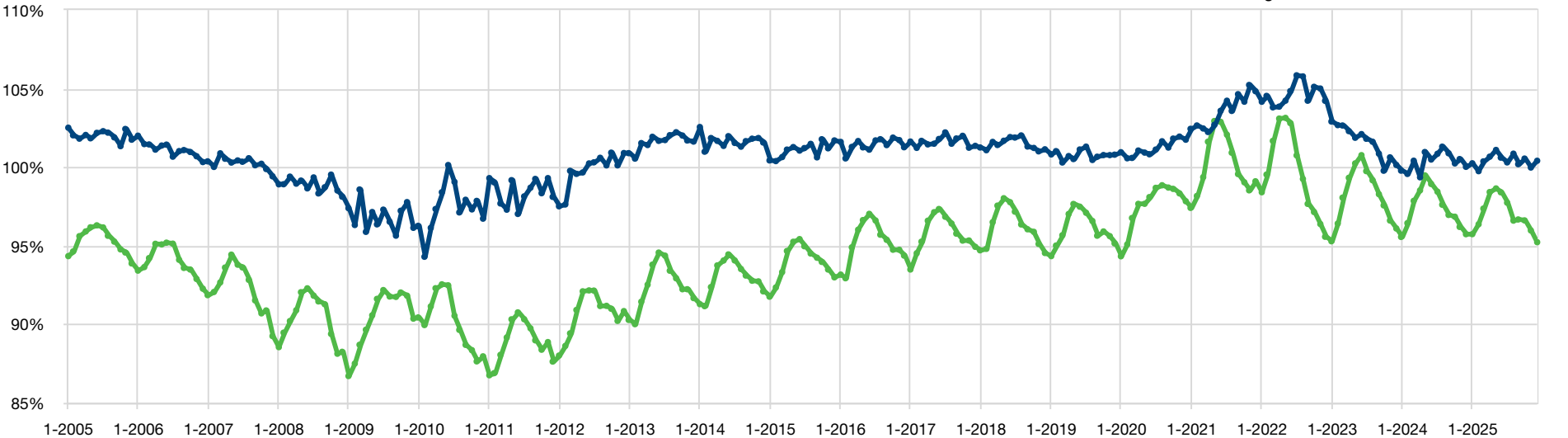
Year to Date



Pct. of Orig. Price Received	Existing Homes	Year-Over-Year Change	New Construction	Year-Over-Year Change
Jan-2025	95.7%	+ 0.1%	100.2%	+ 0.4%
Feb-2025	96.4%	0.0%	99.7%	+ 0.1%
Mar-2025	97.4%	- 0.5%	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%
Aug-2025	96.6%	- 1.0%	100.9%	- 0.4%
Sep-2025	96.7%	- 0.3%	100.2%	- 0.7%
Oct-2025	96.6%	- 0.2%	100.5%	+ 0.3%
Nov-2025	96.0%	- 0.2%	100.0%	- 0.5%
Dec-2025	95.2%	- 0.5%	100.4%	+ 0.4%
12-Month Avg*	97.1%	- 0.4%	100.4%	+ 0.0%

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

Historical Percentage of Original List Price Received by Month

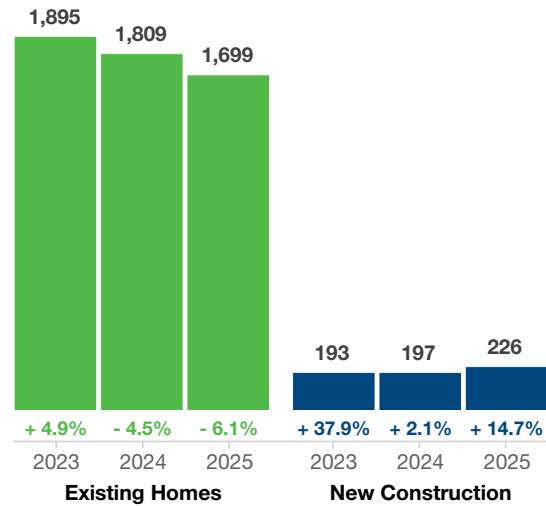


Pending Sales

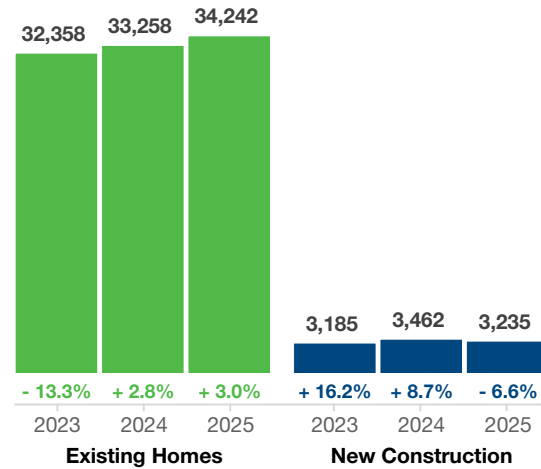
A count of the properties on which offers have been accepted in a given month.



December

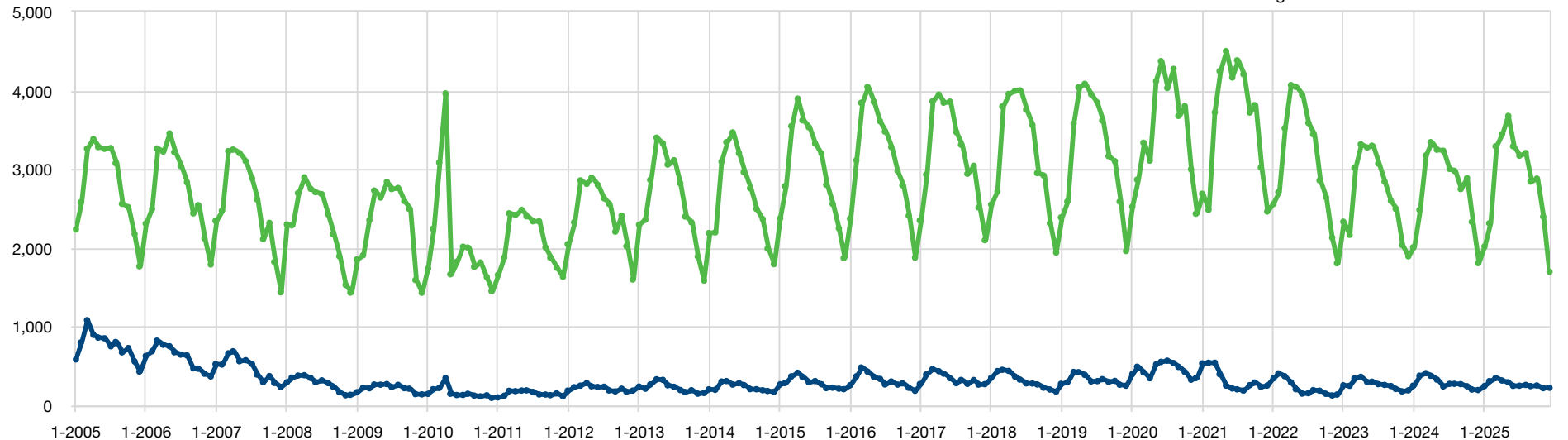


Year to Date



Pending Sales	Existing Homes	Year-Over-Year Change	New Construction	Year-Over-Year Change
Jan-2025	2,020	+ 0.5%	248	- 2.0%
Feb-2025	2,314	- 6.8%	310	- 18.2%
Mar-2025	3,291	+ 3.7%	351	- 14.6%
Apr-2025	3,445	+ 3.0%	318	- 15.9%
May-2025	3,678	+ 13.2%	295	- 10.3%
Jun-2025	3,292	+ 1.8%	250	+ 2.9%
Jul-2025	3,172	+ 5.6%	252	- 8.7%
Aug-2025	3,206	+ 7.6%	262	- 5.1%
Sep-2025	2,844	+ 3.5%	247	- 9.2%
Oct-2025	2,882	- 0.2%	255	+ 4.1%
Nov-2025	2,399	+ 2.9%	221	+ 8.9%
Dec-2025	1,699	- 6.1%	226	+ 14.7%
12-Month Avg	2,854	+ 3.0%	270	- 6.6%

Historical Pending Sales by Month

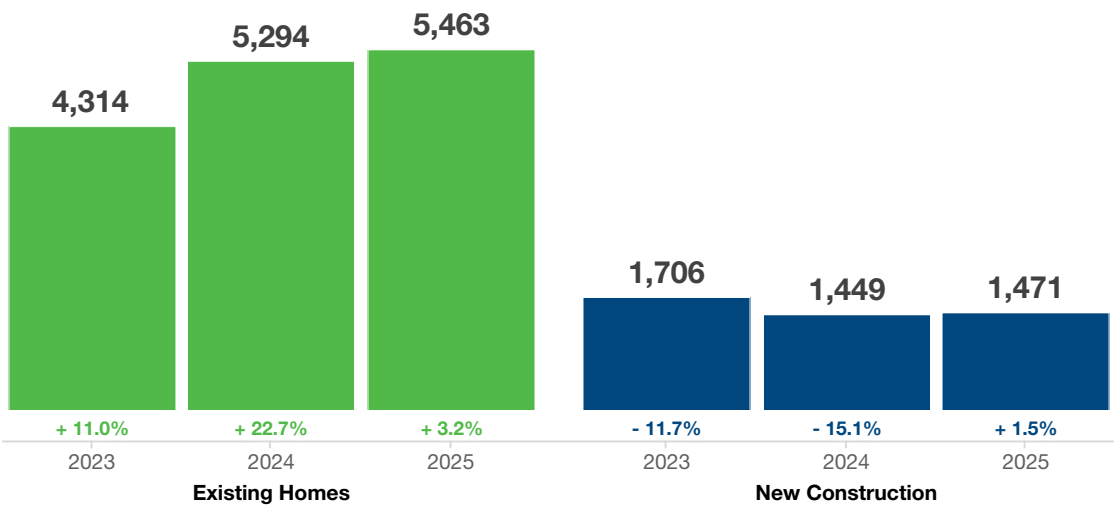


Inventory

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

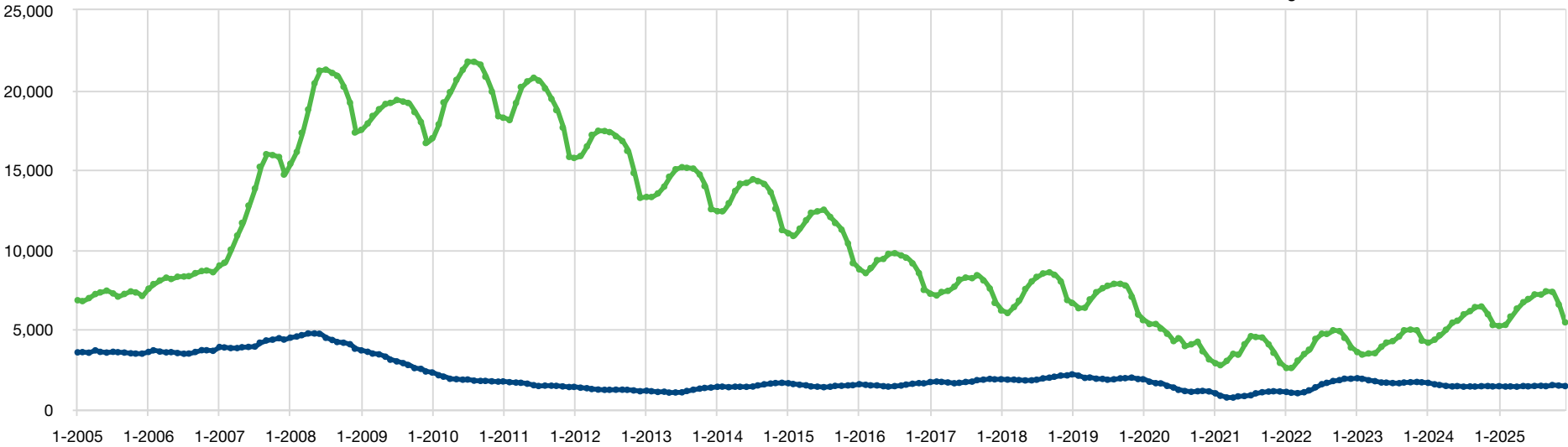


December



Inventory	Existing Homes	Year-Over-Year Change	New Construction	Year-Over-Year Change
Jan-2025	5,233	+ 25.0%	1,463	- 12.6%
Feb-2025	5,304	+ 21.3%	1,440	- 9.0%
Mar-2025	5,821	+ 25.2%	1,448	- 5.9%
Apr-2025	6,323	+ 26.5%	1,433	- 3.2%
May-2025	6,721	+ 23.5%	1,472	+ 1.7%
Jun-2025	6,922	+ 24.5%	1,455	- 0.9%
Jul-2025	7,210	+ 20.9%	1,477	+ 3.1%
Aug-2025	7,199	+ 16.8%	1,487	+ 2.8%
Sep-2025	7,404	+ 15.4%	1,466	+ 1.7%
Oct-2025	7,368	+ 14.2%	1,535	+ 4.9%
Nov-2025	6,579	+ 10.2%	1,503	+ 2.2%
Dec-2025	5,463	+ 3.2%	1,471	+ 1.5%
12-Month Avg	6,462	+ 18.4%	1,471	- 1.3%

Historical Inventory by Month

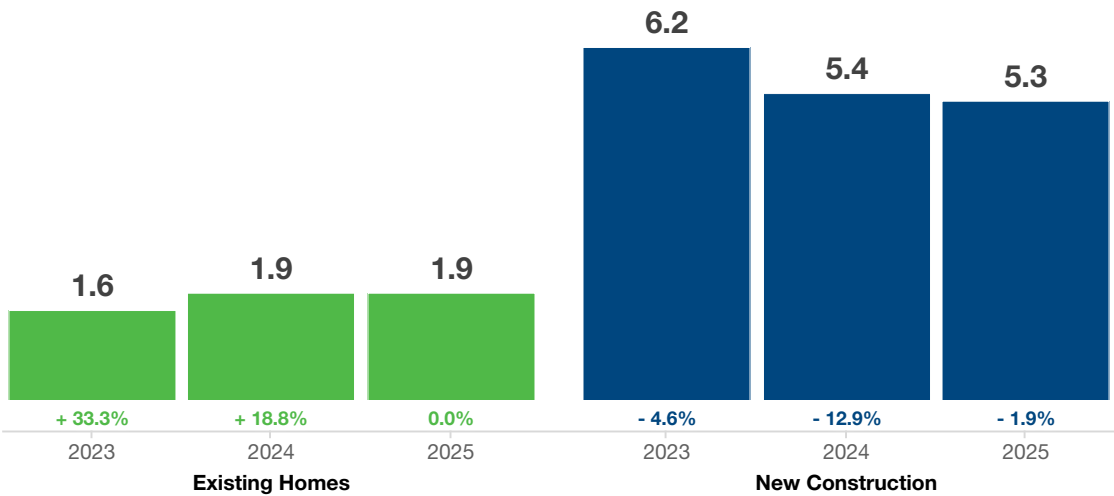


Supply

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.



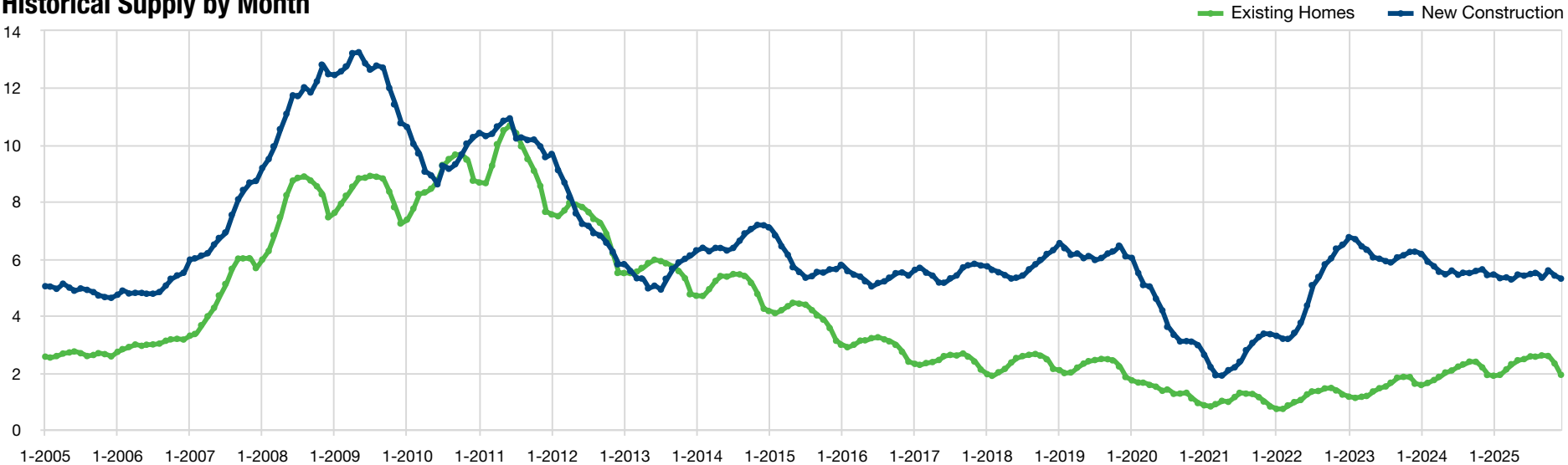
December



Supply	Existing Homes	Year-Over-Year Change	New Construction	Year-Over-Year Change
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%	5.3	- 3.6%
May-2025	2.4	+ 20.0%	5.4	- 1.8%
Jun-2025	2.5	+ 19.0%	5.4	- 3.6%
Jul-2025	2.6	+ 18.2%	5.5	+ 1.9%
Aug-2025	2.6	+ 13.0%	5.5	0.0%
Sep-2025	2.6	+ 8.3%	5.3	- 3.6%
Oct-2025	2.6	+ 8.3%	5.6	0.0%
Nov-2025	2.3	+ 4.5%	5.4	- 3.6%
Dec-2025	1.9	0.0%	5.3	- 1.9%
12-Month Avg*	2.3	+ 14.3%	5.4	- 3.9%

* Supply for all properties from January 2025 through December 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	12-2024	12-2025	% Change	YTD 2024	YTD 2025	% Change
Closed Sales		2,892	2,984	+ 3.2%	36,451	37,505	+ 2.9%
Average Sales Price		\$363,072	\$370,961	+ 2.2%	\$357,773	\$381,970	+ 6.8%
Median Sales Price		\$310,000	\$315,000	+ 1.6%	\$305,000	\$320,711	+ 5.2%
Days on Market Until Sale		46	49	+ 6.5%	40	42	+ 5.0%
Pct. of Orig. Price Received		96.2%	95.7%	- 0.5%	97.8%	97.4%	- 0.4%
Pending Sales		2,006	1,925	- 4.0%	36,720	37,477	+ 2.1%
Inventory		6,743	6,934	+ 2.8%	—	—	—
Supply		2.2	2.2	0.0%	—	—	—