

# Charlotte Region Weekly Market Activity Report

A research tool provided by the Canopy Realtor® Association

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## For Week Ending November 29, 2025

Data current as of December 8, 2025

U.S. homeowners earned an average profit of 49.9% on the sale of single-family homes and condominiums in the third quarter of 2025, according to ATTOM's latest U.S. Home Sales Report. That figure is up slightly from 49.3% in the second quarter, but remains below the 55.4% recorded during the third quarter of 2024. The typical homeowner realized a profit of \$123,100 in the third quarter, up 1.9% from the previous quarter but down 3.5% from a year earlier.

In the Charlotte region, for the week ending November 29:

- New Listings increased 6.8% to 584
- Pending Sales increased 8.3% to 616
- Inventory increased 19.9% to 11,643

For the month of November:

- Median Sales Price increased 2.6% to \$400,000
- List to Close increased 7.7% to 98
- Percent of Original List Price Received decreased 1.0% to 94.8%
- Months Supply of Homes for Sale increased 14.8% to 3.1

## Quick Facts

+ 6.8%	+ 8.3%	+ 19.9%
Change in New Listings	Change in Pending Sales	Change in Inventory

The Charlotte Region report includes Alexander, Anson, Cabarrus, Catawba, Cleveland, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Stanly and Union counties in North Carolina, and Chester, Chesterfield, Lancaster and York counties in South Carolina. Comprised of single-family properties, townhomes and condominiums combined. Data is refreshed regularly to capture changes in market activity. Figures shown may be different than previously reported. Percent changes are calculated using rounded figures.

### Metrics by Week

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Data is refreshed regularly to capture changes in market activity so figures shown may be different than previously reported.

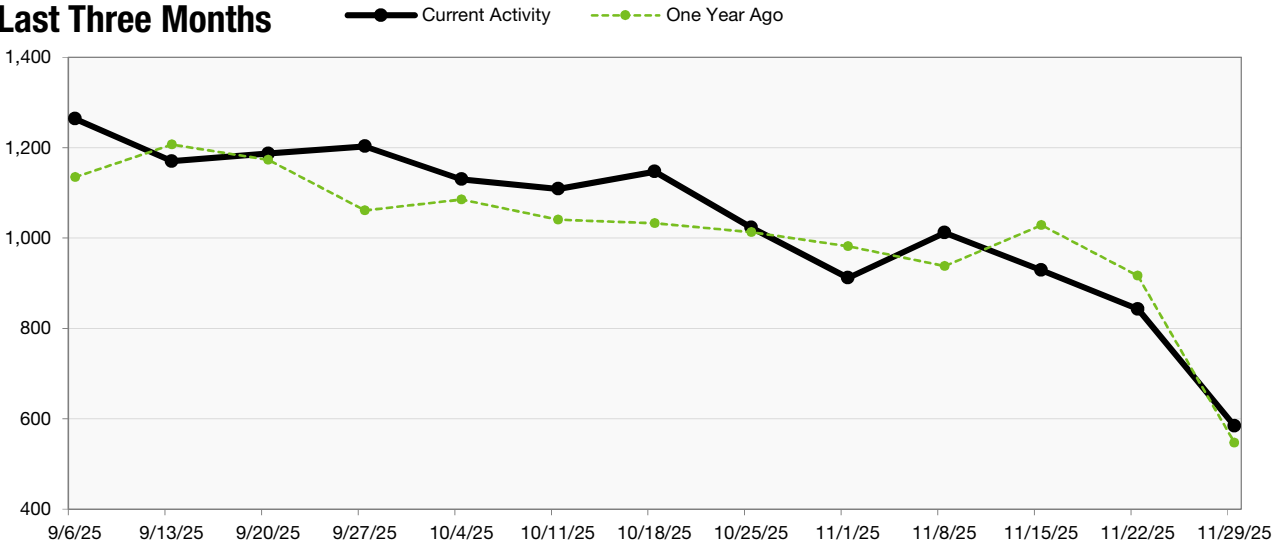


# New Listings

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

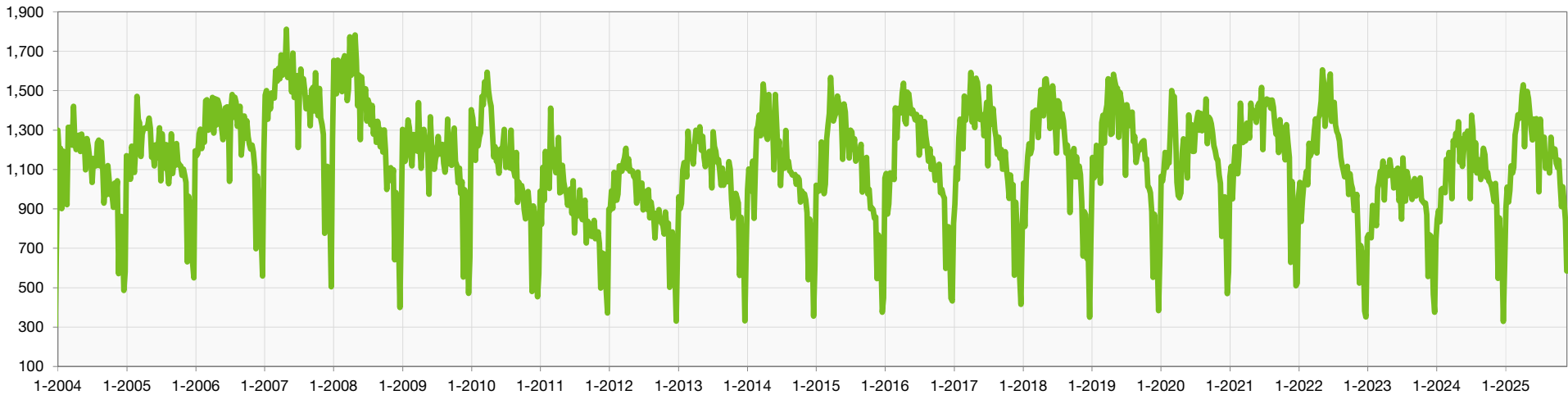


## Last Three Months



For the Week Ending	Current Activity	One Year Ago	+ / -
9/6/2025	1,264	1,135	+ 11.4%
9/13/2025	1,170	1,207	- 3.1%
9/20/2025	1,187	1,173	+ 1.2%
9/27/2025	1,203	1,061	+ 13.4%
10/4/2025	1,130	1,085	+ 4.1%
10/11/2025	1,109	1,041	+ 6.5%
10/18/2025	1,147	1,033	+ 11.0%
10/25/2025	1,023	1,013	+ 1.0%
11/1/2025	912	982	- 7.1%
11/8/2025	1,012	938	+ 7.9%
11/15/2025	929	1,029	- 9.7%
11/22/2025	843	917	- 8.1%
11/29/2025	584	547	+ 6.8%
3-Month Total	13,513	13,161	+ 2.7%

## Historical New Listing Activity



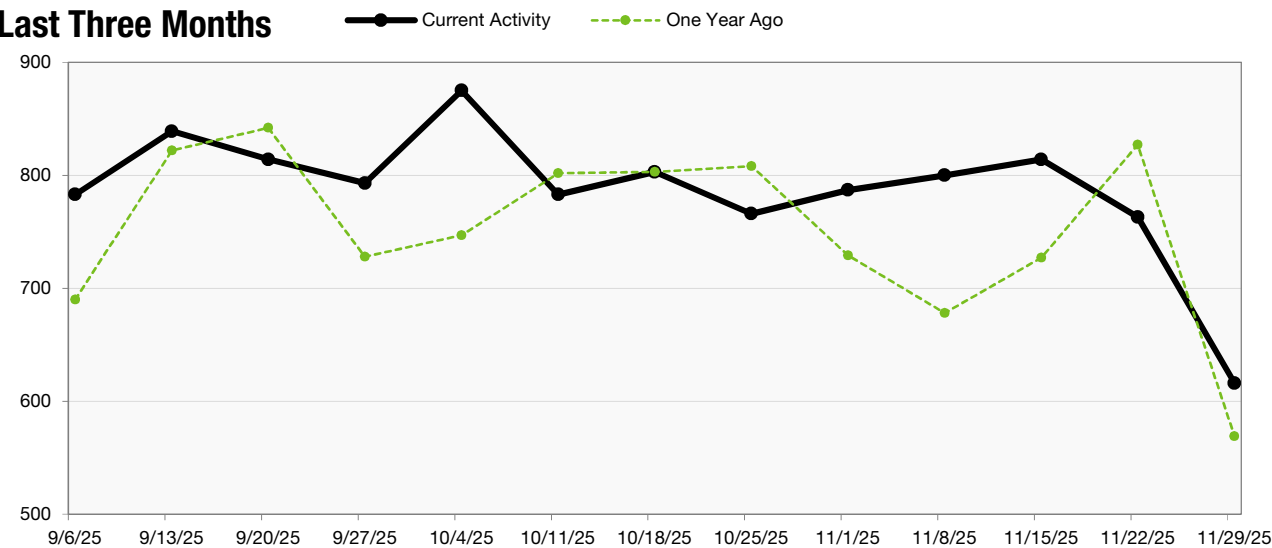
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# Pending Sales

A count of the properties on which contracts have been accepted in a given week.  
Pending contracts include “Under Contract-Show” and “Under Contract-No Show” statuses.

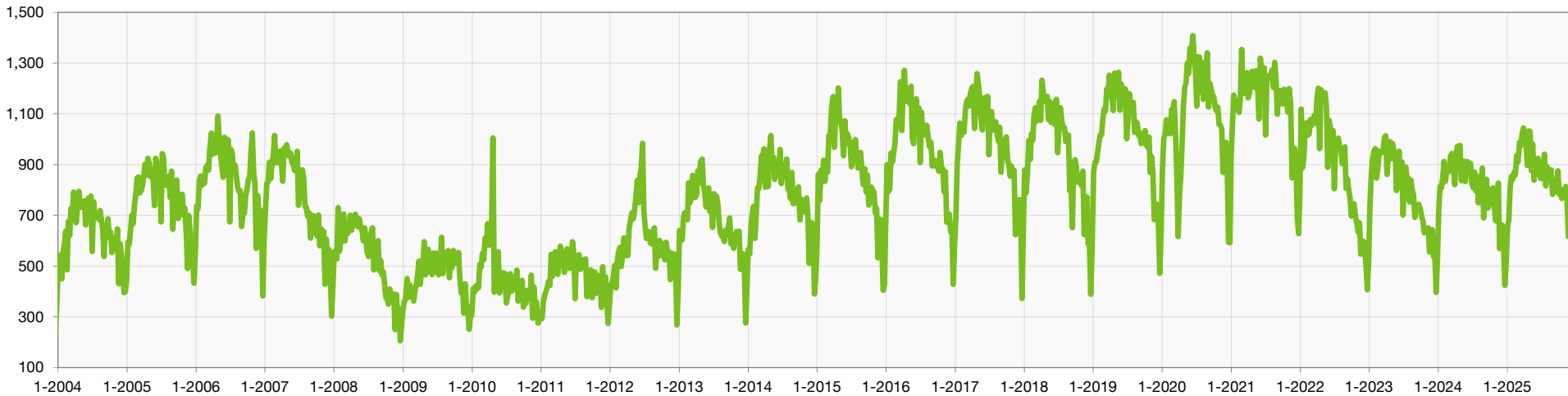


## Last Three Months



For the Week Ending	Current Activity	One Year Ago	+ / -
9/6/2025	783	690	+ 13.5%
9/13/2025	839	822	+ 2.1%
9/20/2025	814	842	- 3.3%
9/27/2025	793	728	+ 8.9%
10/4/2025	875	747	+ 17.1%
10/11/2025	783	802	- 2.4%
10/18/2025	803	803	0.0%
10/25/2025	766	808	- 5.2%
11/1/2025	787	729	+ 8.0%
11/8/2025	800	678	+ 18.0%
11/15/2025	814	727	+ 12.0%
11/22/2025	763	827	- 7.7%
11/29/2025	616	569	+ 8.3%
3-Month Total	10,236	9,772	+ 4.7%

## Historical Pending Sales Activity



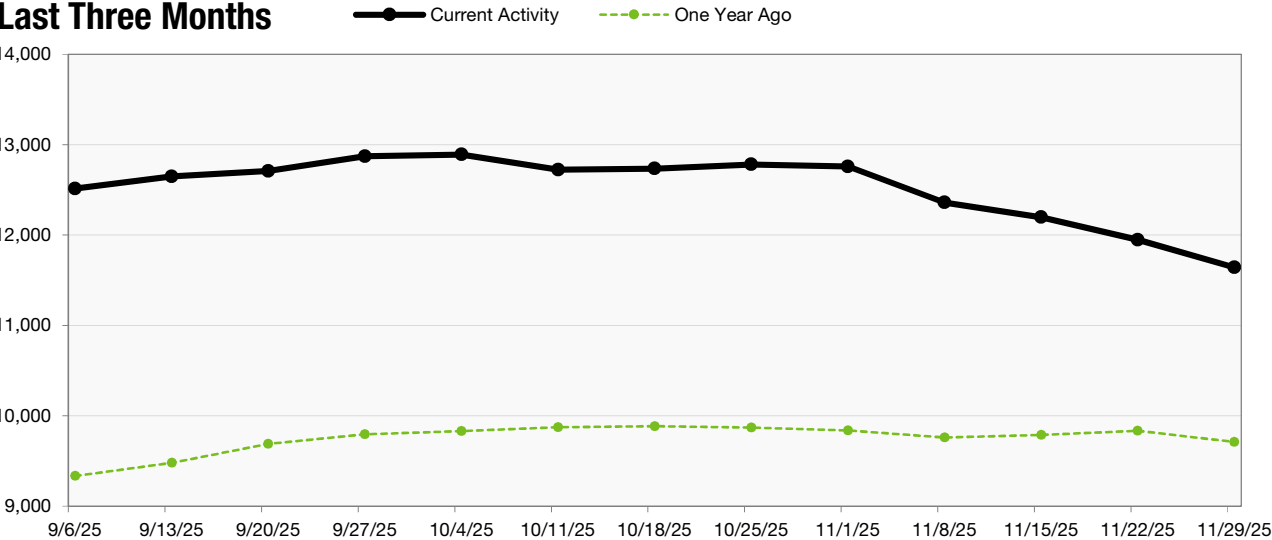
CanopyMLS, Inc. did not include "showable" under contract listings in the Pending Sales stats before July 2012. Listing agents report listings as Under Contract-Show earlier in the transaction. As a result, Pending Sales stats trend higher since July 2012. | Data is refreshed regularly to capture changes in market activity so figures shown may be different than previously reported.

# Inventory of Homes for Sale

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



## Last Three Months



For the Week Ending	Current Activity	One Year Ago	+ / -
9/6/2025	12,515	9,334	+ 34.1%
9/13/2025	12,649	9,481	+ 33.4%
9/20/2025	12,709	9,690	+ 31.2%
9/27/2025	12,872	9,795	+ 31.4%
10/4/2025	12,891	9,829	+ 31.2%
10/11/2025	12,724	9,874	+ 28.9%
10/18/2025	12,735	9,885	+ 28.8%
10/25/2025	12,782	9,868	+ 29.5%
11/1/2025	12,759	9,839	+ 29.7%
11/8/2025	12,361	9,759	+ 26.7%
11/15/2025	12,197	9,787	+ 24.6%
11/22/2025	11,947	9,834	+ 21.5%
11/29/2025	11,643	9,711	+ 19.9%
3-Month Avg	12,522	9,745	+ 28.5%

## Historical Inventory Activity



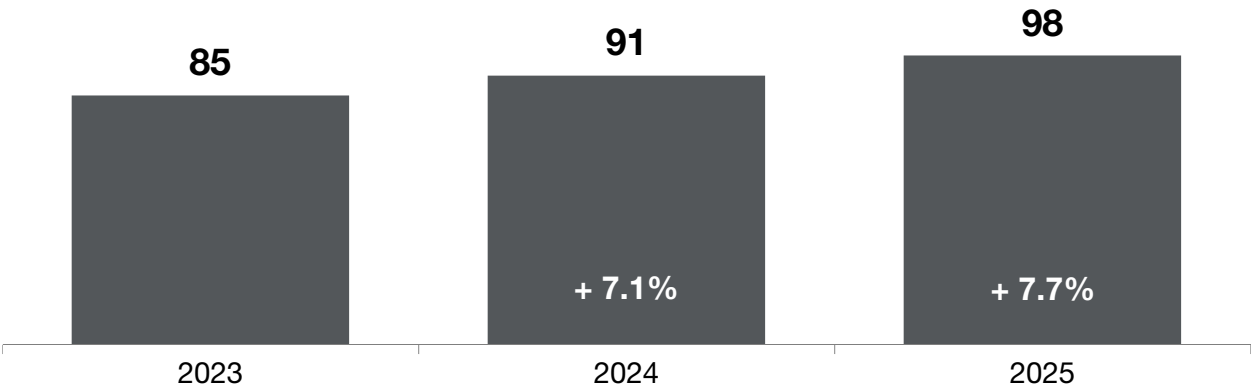
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# List to Close

“List to Close” provides the total number of days specific to the MLS number from “Listing Date” to “Sold Date.”

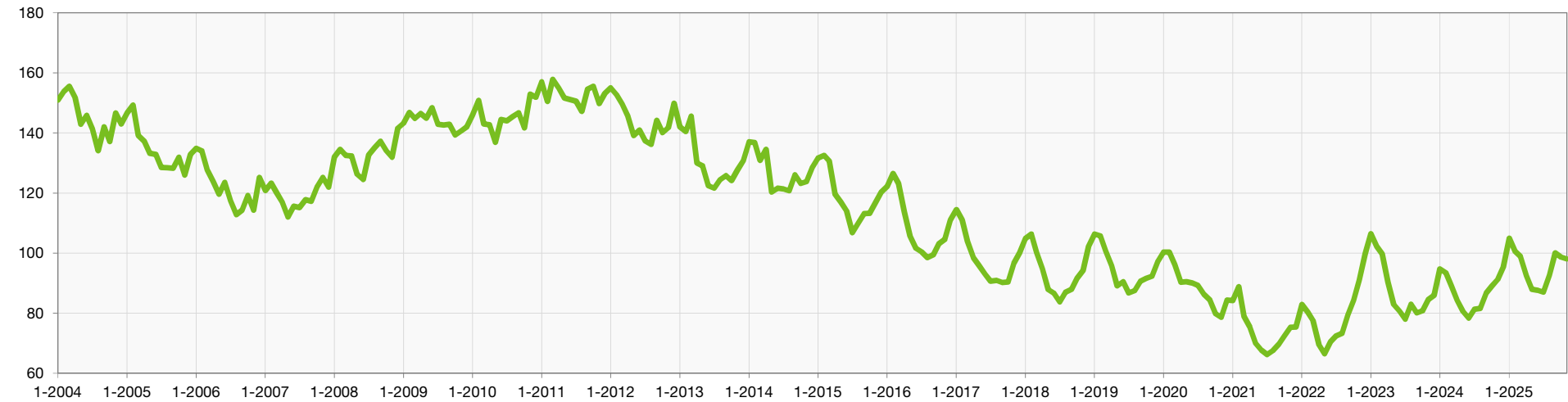


## November



Month	Current Activity	One Year Previous	+ / -
December 2024	95	86	+ 10.5%
January 2025	105	95	+ 10.5%
February 2025	101	93	+ 8.6%
March 2025	99	89	+ 11.2%
April 2025	92	84	+ 9.5%
May 2025	88	81	+ 8.6%
June 2025	88	78	+ 12.8%
July 2025	87	81	+ 7.4%
August 2025	93	82	+ 13.4%
September 2025	100	87	+ 14.9%
October 2025	99	89	+ 11.2%
November 2025	98	91	+ 7.7%
12-Month Avg	95	86	+ 10.5%

## Historical List to Close



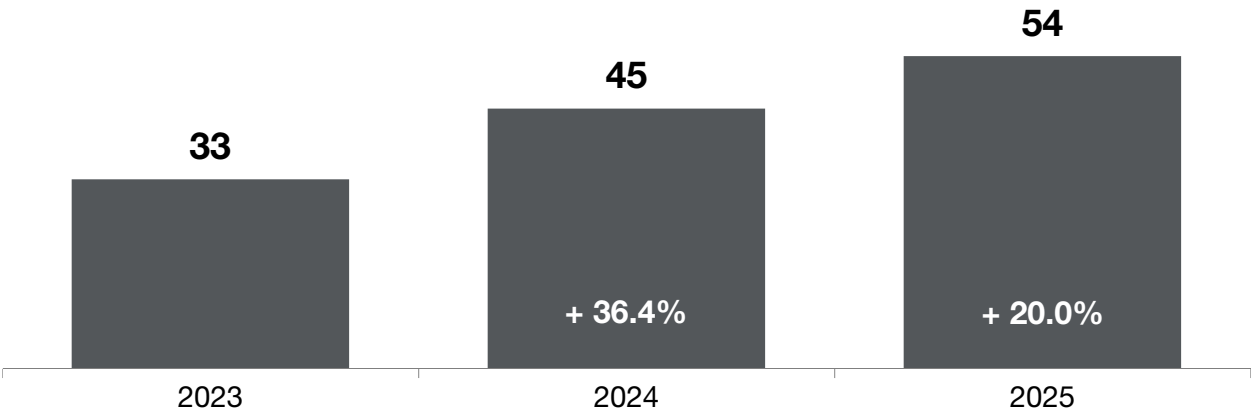
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# Days on Market

Days on Market (DOM) tracks the days on market for a property specific to the MLS number. DOM accrues for "Active" and "Under Contract-Show" statuses. DOM does not include any days that the listing is in "Under Contract-No Show," "Temporarily off Market," "Closed/Sold," "Expired" and "Withdrawn" statuses.

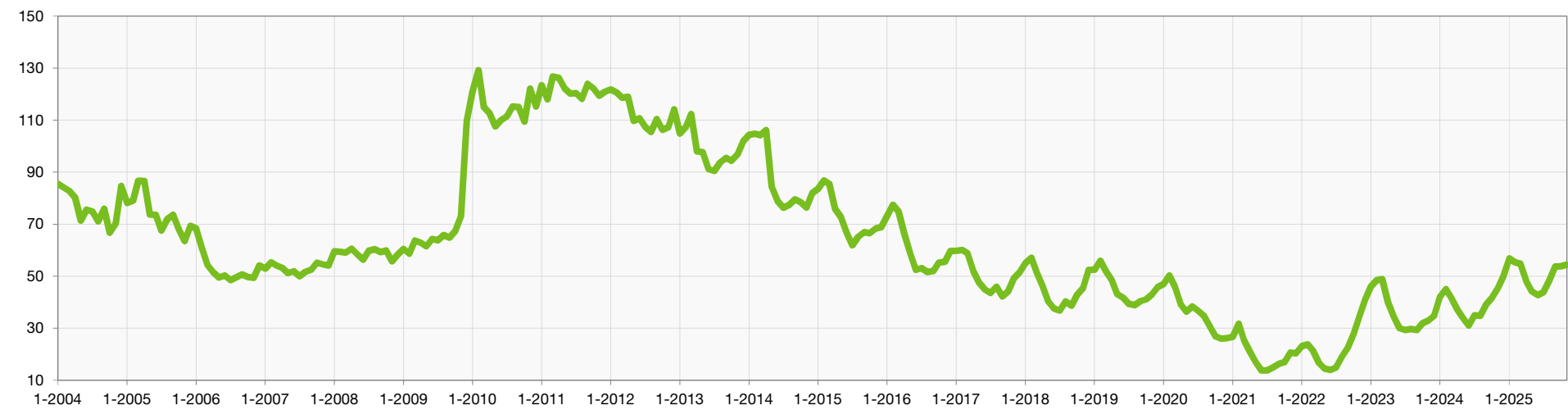


## November



Month	Current Activity	One Year Previous	+/-
December 2024	50	35	+ 42.9%
January 2025	57	42	+ 35.7%
February 2025	55	45	+ 22.2%
March 2025	55	42	+ 31.0%
April 2025	48	37	+ 29.7%
May 2025	44	34	+ 29.4%
June 2025	43	31	+ 38.7%
July 2025	44	35	+ 25.7%
August 2025	48	35	+ 37.1%
September 2025	54	39	+ 38.5%
October 2025	54	42	+ 28.6%
November 2025	54	45	+ 20.0%
12-Month Avg	50	38	+ 31.6%

## Historical Days on Market



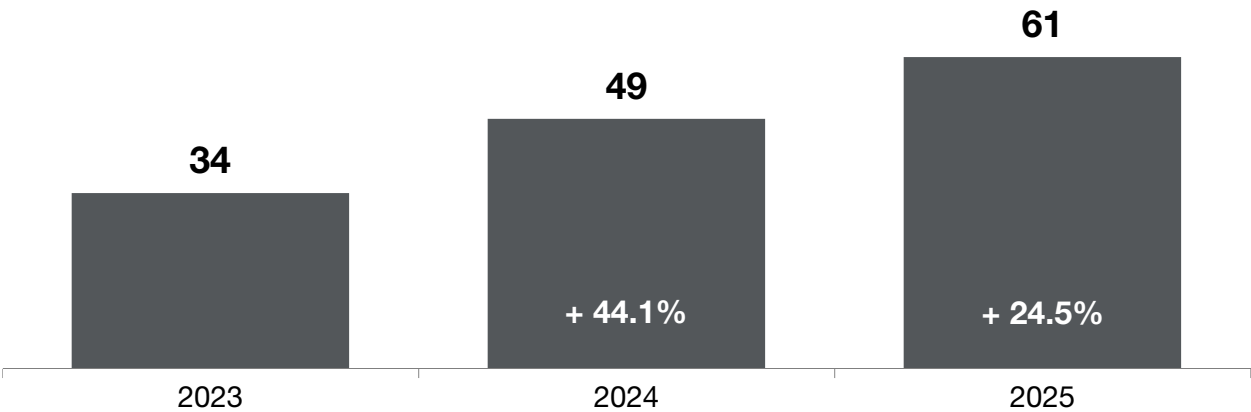
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# Cumulative Days on Market

Cumulative Days on Market (CDOM) functions like Days on Market (DOM); except CDOM tracks the DOM for a property over multiple listings on the property. When a new listing is entered, the CDOM only resets to zero if the previous listing closed (sold) or if the previous listing has been off the market (expired or withdrawn) for more than 90 days.

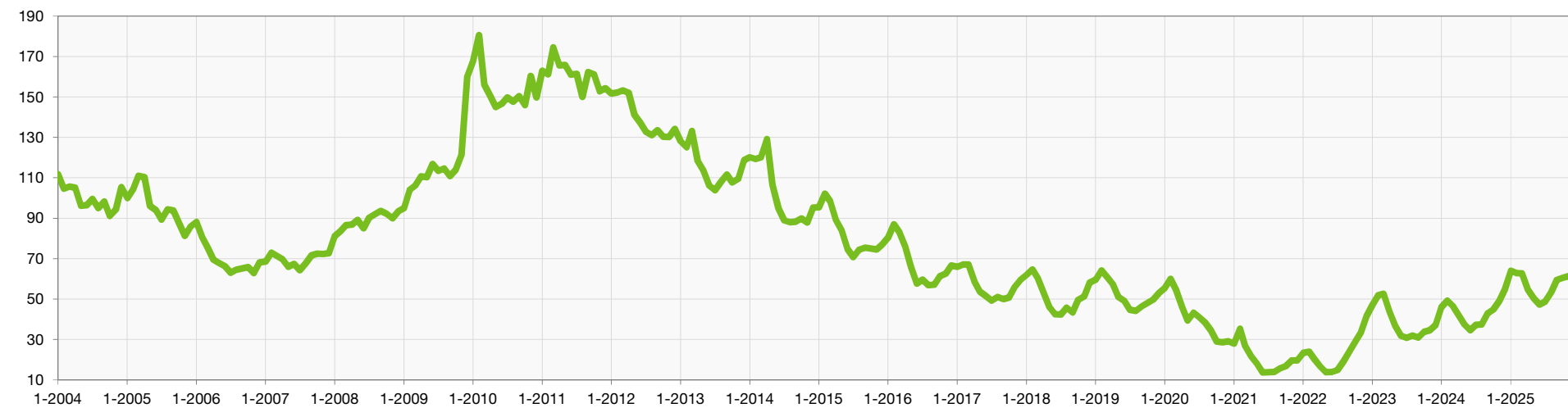


## November



Month	Current Activity	One Year Previous	+/-
December 2024	55	37	+ 48.6%
January 2025	64	46	+ 39.1%
February 2025	63	49	+ 28.6%
March 2025	63	46	+ 37.0%
April 2025	55	42	+ 31.0%
May 2025	50	37	+ 35.1%
June 2025	47	35	+ 34.3%
July 2025	49	37	+ 32.4%
August 2025	53	37	+ 43.2%
September 2025	60	43	+ 39.5%
October 2025	61	45	+ 35.6%
November 2025	61	49	+ 24.5%
12-Month Avg	56	42	+ 33.3%

## Historical Cumulative Days on Market



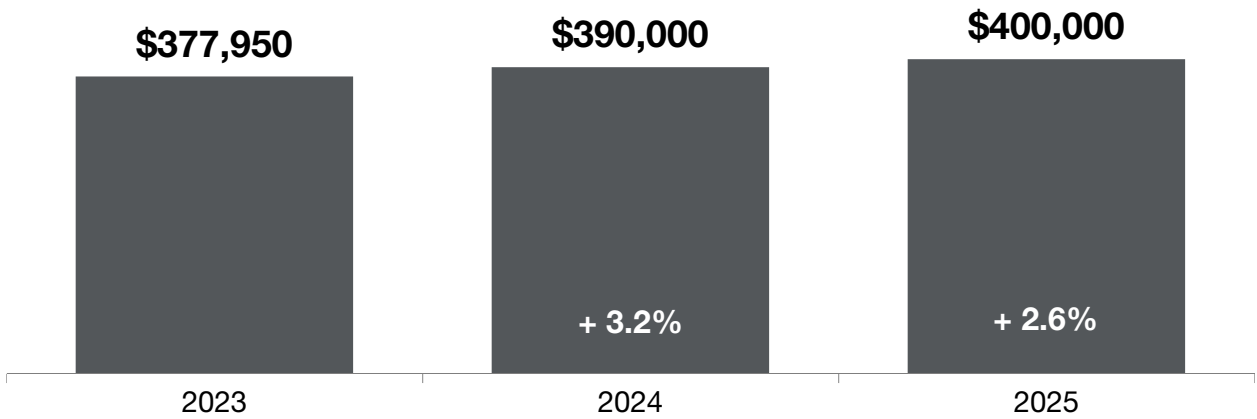
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# Median Sales Price

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



## November



Month	Current Activity	One Year Previous	+ / -
December 2024	\$385,000	\$370,000	+ 4.1%
January 2025	\$381,546	\$374,900	+ 1.8%
February 2025	\$385,000	\$385,000	0.0%
March 2025	\$392,000	\$384,990	+ 1.8%
April 2025	\$395,700	\$390,100	+ 1.4%
May 2025	\$405,000	\$400,000	+ 1.3%
June 2025	\$415,000	\$406,000	+ 2.2%
July 2025	\$405,000	\$400,143	+ 1.2%
August 2025	\$400,000	\$395,000	+ 1.3%
September 2025	\$395,000	\$393,000	+ 0.5%
October 2025	\$400,000	\$393,000	+ 1.8%
November 2025	\$400,000	\$390,000	+ 2.6%
12-Month Avg	\$399,000	\$390,000	+ 2.3%

## Historical Median Sales Price



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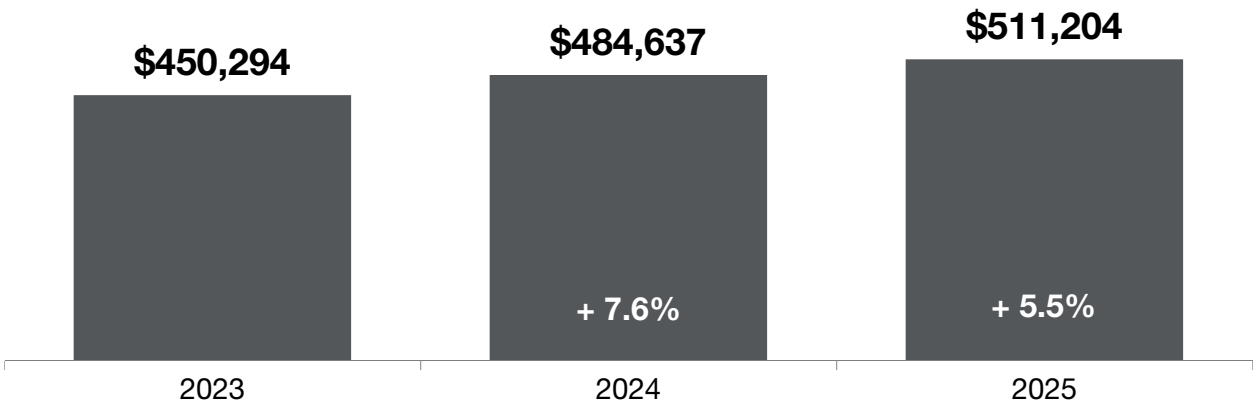


# Average Sales Price

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

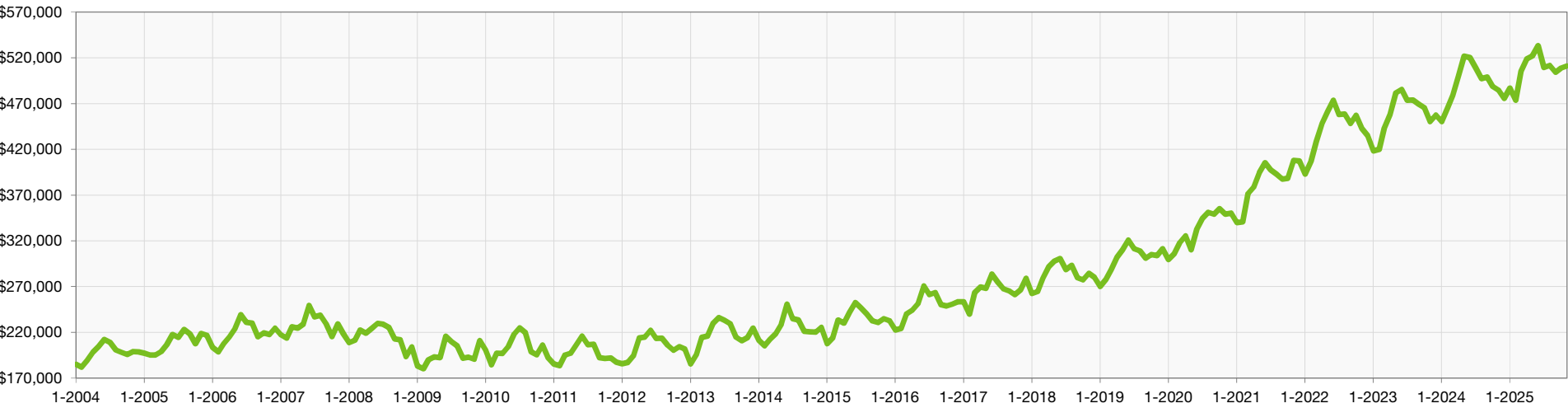


## November



Month	Current Activity	One Year Previous	+ / -
December 2024	\$475,757	\$457,544	+ 4.0%
January 2025	\$487,043	\$450,392	+ 8.1%
February 2025	\$473,655	\$464,917	+ 1.9%
March 2025	\$505,448	\$478,911	+ 5.5%
April 2025	\$518,924	\$499,746	+ 3.8%
May 2025	\$522,008	\$521,839	+ 0.0%
June 2025	\$533,348	\$520,422	+ 2.5%
July 2025	\$509,341	\$508,959	+ 0.1%
August 2025	\$511,823	\$497,198	+ 2.9%
September 2025	\$504,065	\$498,979	+ 1.0%
October 2025	\$508,798	\$488,528	+ 4.1%
November 2025	\$511,204	\$484,637	+ 5.5%
12-Month Avg	\$507,008	\$492,360	+ 3.0%

## Historical Average Sales Price



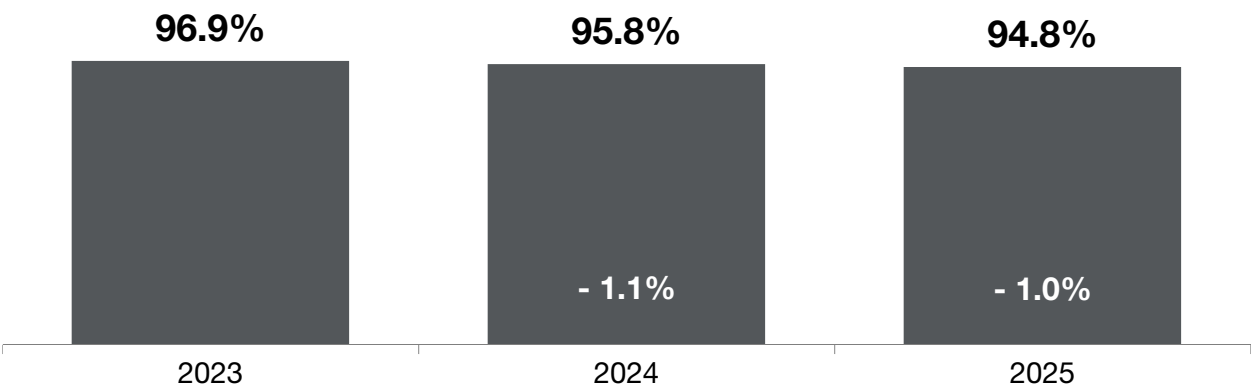
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# Percent of Original List Price Received

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.

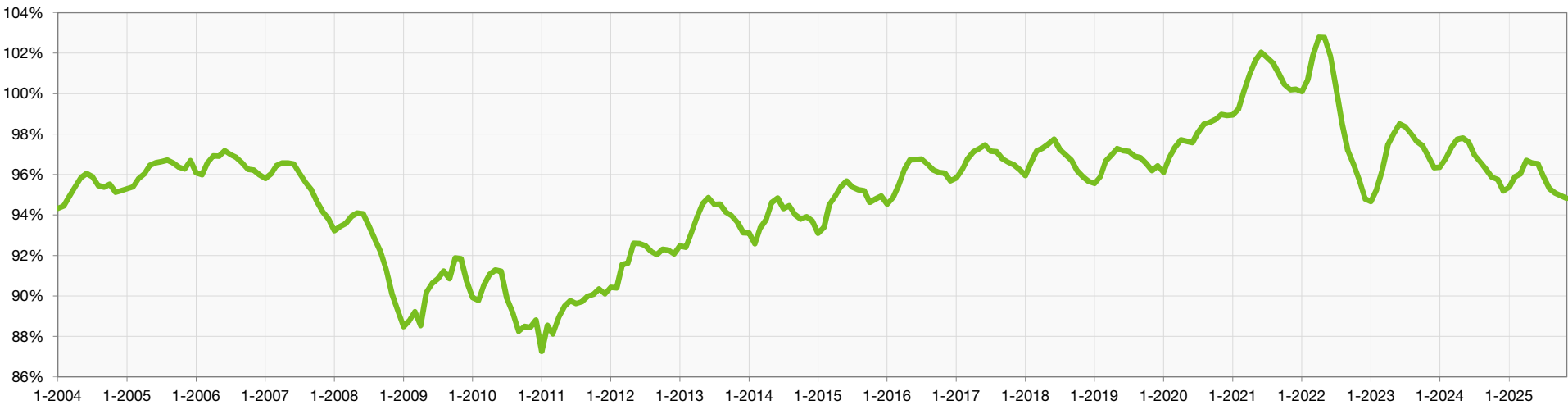


## November



Month	Current Activity	One Year Previous	+ / -
December 2024	95.2%	96.3%	- 1.1%
January 2025	95.4%	96.4%	- 1.0%
February 2025	95.9%	96.8%	- 0.9%
March 2025	96.0%	97.3%	- 1.3%
April 2025	96.7%	97.7%	- 1.0%
May 2025	96.6%	97.8%	- 1.2%
June 2025	96.5%	97.6%	- 1.1%
July 2025	95.9%	97.0%	- 1.1%
August 2025	95.3%	96.6%	- 1.3%
September 2025	95.1%	96.3%	- 1.2%
October 2025	95.0%	95.9%	- 0.9%
November 2025	94.8%	95.8%	- 1.0%
12-Month Avg	95.7%	96.8%	- 1.1%

## Historical Percent of Original List Price Received



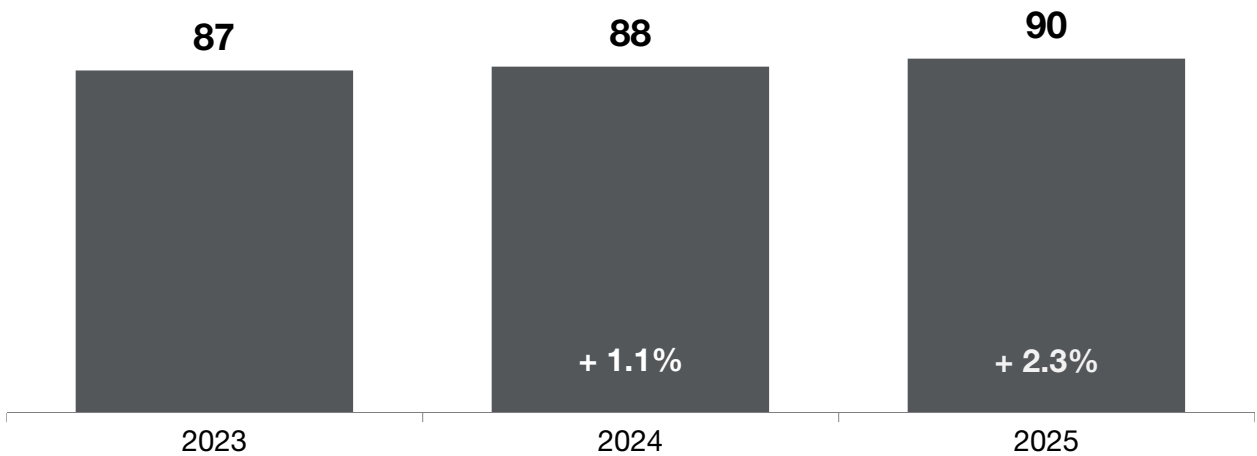
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# Housing Affordability Index

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

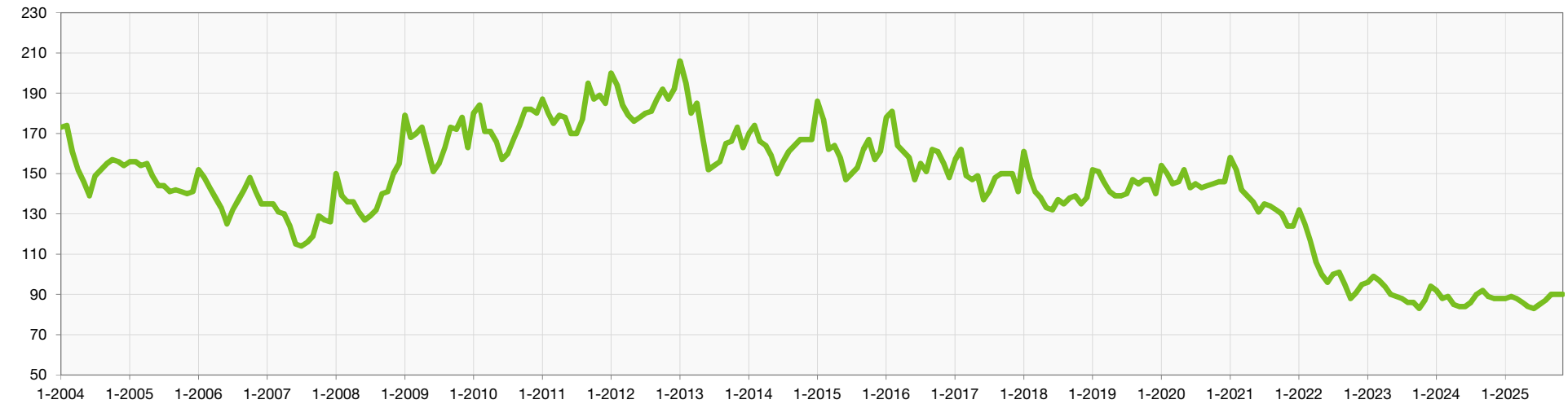


## November



Month	Current Activity	One Year Previous	+ / -
December 2024	88	94	- 6.4%
January 2025	88	92	- 4.3%
February 2025	89	88	+ 1.1%
March 2025	88	89	- 1.1%
April 2025	86	85	+ 1.2%
May 2025	84	84	0.0%
June 2025	83	84	- 1.2%
July 2025	85	86	- 1.2%
August 2025	87	90	- 3.3%
September 2025	90	92	- 2.2%
October 2025	90	89	+ 1.1%
November 2025	90	88	+ 2.3%
12-Month Avg	87	88	- 1.1%

## Historical Housing Affordability Index



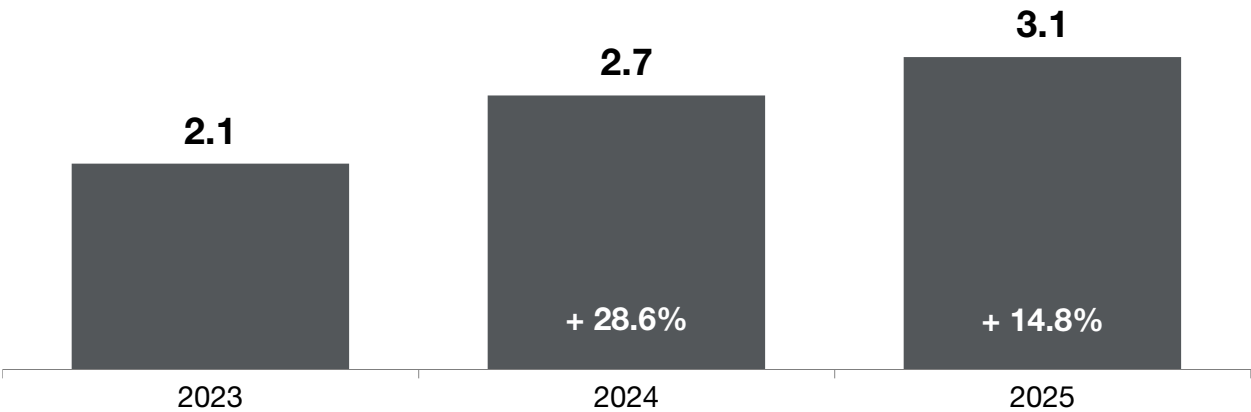
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# Months Supply of Homes for Sale

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

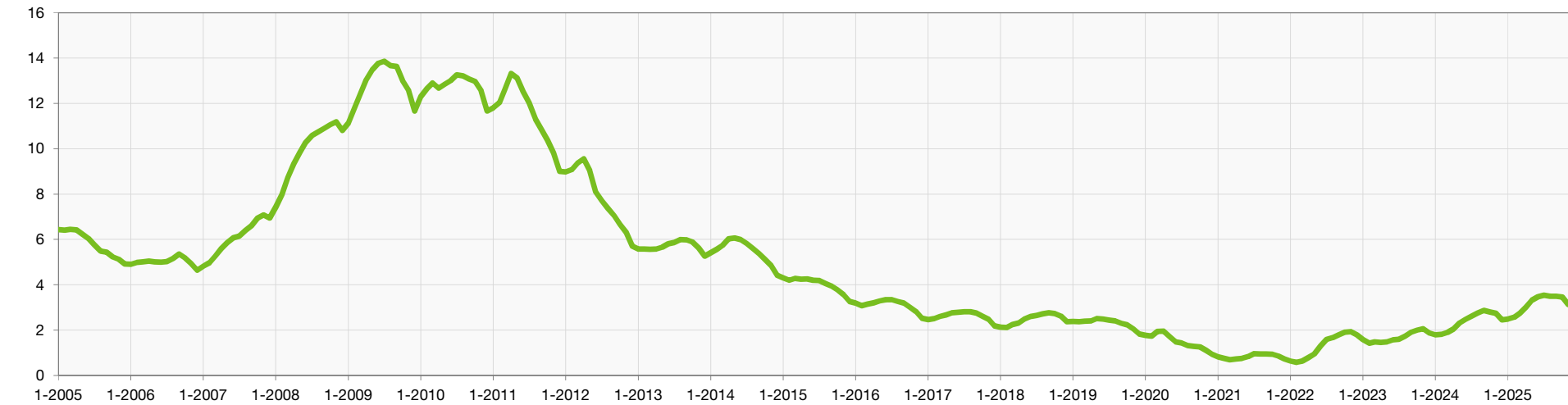


## November



Month	Current Activity	One Year Previous	+ / -
December 2024	2.5	1.9	+ 31.6%
January 2025	2.5	1.8	+ 38.9%
February 2025	2.6	1.8	+ 44.4%
March 2025	2.7	1.9	+ 42.1%
April 2025	3.0	2.1	+ 42.9%
May 2025	3.3	2.3	+ 43.5%
June 2025	3.5	2.5	+ 40.0%
July 2025	3.5	2.6	+ 34.6%
August 2025	3.5	2.8	+ 25.0%
September 2025	3.5	2.9	+ 20.7%
October 2025	3.5	2.8	+ 25.0%
November 2025	3.1	2.7	+ 14.8%
12-Month Avg	3.1	2.3	+ 34.8%

## Historical Months Supply of Inventory



CanopyMLS, Inc. did not include "showable" under contract listings in the Pending Sales stats before July 2012. Listing agents report listings as Under Contract-Show earlier in the transaction. As a result, Months Supply of Homes for Sale stats trend lower since July 2012. | Data is refreshed regularly to capture changes in market activity so figures shown may be different than previously reported.