

# Monthly Indicators



## July 2020

Healthy buyer demand and constrained supply continue to be the story for much of the country. Nationally, showing activity in July remained substantially higher than a year before and multiple offer situations are a frequent experience in many markets. With the inventory of homes for sale still constrained, a competitive market for buyers shows little sign of waning.

New Listings were up 20.8 percent for single family homes and 46.6 percent for Condo/TIC/Coop properties. Pending Sales increased 38.5 percent for single family homes and 14.0 percent for Condo/TIC/Coop properties.

The Median Sales Price was up 6.0 percent to \$1,670,000 for single family homes and 3.7 percent to \$1,268,200 for Condo/TIC/Coop properties. Months Supply of Inventory increased 40.0 percent for single family units and 109.7 percent for Condo/TIC/Coop units.

While the number of unemployment insurance weekly initial claims have been far lower in recent weeks than their peak in March and April, more than 1 million new claims are still being filed each week and more 31 million were claiming benefits in all programs as of early July, compared to fewer than 2 million in July 2019. Despite this significant economic impact, home buyers remain extremely resilient. With mortgage rates remaining near record-low levels and home purchase mortgage applications up from a year ago, high buyer activity is expected to continue into the late summer and early fall market.

## Monthly Snapshot

**+ 6.0%**      **+ 3.7%**      **+ 4.7%**

| One-Year Change in Median Sales Price Single Family | One-Year Change in Median Sales Price Condo/TIC/Coop | One-Year Change in Median Sales Price All Property Types |
|---|--|--|
|---|--|--|

Residential real estate activity in San Francisco County (Districts 1-10) composed of single-family properties, townhomes and condominiums. Percent changes are calculated using rounded figures.

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# Single Family Activity Overview



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

| Key Metrics                                 | Historical Sparkbars | 7-2019      | 7-2020             | Percent Change | YTD 2019    | YTD 2020           | Percent Change |
|---|----------------------|-------------|--------------------|----------------|-------------|--------------------|----------------|
| <b>New Listings</b>                         |                      | 197         | <b>238</b>         | + 20.8%        | 1,615       | <b>1,529</b>       | - 5.3%         |
| <b>Pending Sales</b>                        |                      | 182         | <b>252</b>         | + 38.5%        | 1,289       | <b>1,057</b>       | - 18.0%        |
| <b>Sold Listings</b>                        |                      | 213         | <b>211</b>         | - 0.9%         | 1,253       | <b>958</b>         | - 23.5%        |
| <b>Median Sales Price</b>                   |                      | \$1,576,000 | <b>\$1,670,000</b> | + 6.0%         | \$1,605,000 | <b>\$1,660,000</b> | + 3.4%         |
| <b>Avg. Sales Price</b>                     |                      | \$1,959,574 | <b>\$2,089,958</b> | + 6.7%         | \$2,060,010 | <b>\$2,123,870</b> | + 3.1%         |
| <b>Days on Market</b>                       |                      | 23          | <b>26</b>          | + 13.0%        | 25          | <b>25</b>          | 0.0%           |
| <b>Active Listings</b>                      |                      | 466         | <b>564</b>         | + 21.0%        | --          | --                 | --             |
| <b>% of Properties Sold Over List Price</b> |                      | 82.6%       | <b>64.0%</b>       | - 22.5%        | 76.8%       | <b>65.8%</b>       | - 14.3%        |
| <b>% of List Price Received</b>             |                      | 115.4%      | <b>106.3%</b>      | - 7.9%         | 112.8%      | <b>108.5%</b>      | - 3.8%         |
| <b>Affordability Ratio</b>                  |                      | 33          | <b>34</b>          | + 3.0%         | 32          | <b>34</b>          | + 6.3%         |
| <b>Months Supply</b>                        |                      | 2.5         | <b>3.5</b>         | + 40.0%        | --          | --                 | --             |

# Condo/TIC/Coop Activity Overview



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

| Key Metrics                                 | Historical Sparkbars | 7-2019      | 7-2020             | Percent Change | YTD 2019    | YTD 2020           | Percent Change |
|---|----------------------|-------------|--------------------|----------------|-------------|--------------------|----------------|
| <b>New Listings</b>                         |                      | 320         | <b>469</b>         | + 46.6%        | 2,370       | <b>2,648</b>       | + 11.7%        |
| <b>Pending Sales</b>                        |                      | 207         | <b>236</b>         | + 14.0%        | 1,746       | <b>1,270</b>       | - 27.3%        |
| <b>Sold Listings</b>                        |                      | 244         | <b>256</b>         | + 4.9%         | 1,708       | <b>1,214</b>       | - 28.9%        |
| <b>Median Sales Price</b>                   |                      | \$1,222,444 | <b>\$1,268,200</b> | + 3.7%         | \$1,211,000 | <b>\$1,250,000</b> | + 3.2%         |
| <b>Avg. Sales Price</b>                     |                      | \$1,310,687 | <b>\$1,414,347</b> | + 7.9%         | \$1,344,244 | <b>\$1,381,064</b> | + 2.7%         |
| <b>Days on Market</b>                       |                      | 33          | <b>38</b>          | + 15.2%        | 35          | <b>36</b>          | + 2.9%         |
| <b>Active Listings</b>                      |                      | 734         | <b>1,300</b>       | + 77.1%        | --          | --                 | --             |
| <b>% of Properties Sold Over List Price</b> |                      | 70.5%       | <b>46.1%</b>       | - 34.6%        | 59.7%       | <b>48.7%</b>       | - 18.4%        |
| <b>% of List Price Received</b>             |                      | 107.6%      | <b>101.2%</b>      | - 5.9%         | 105.8%      | <b>102.5%</b>      | - 3.1%         |
| <b>Affordability Ratio</b>                  |                      | 49          | <b>53</b>          | + 8.2%         | 49          | <b>54</b>          | + 10.2%        |
| <b>Months Supply</b>                        |                      | 3.1         | <b>6.5</b>         | + 109.7%       | --          | --                 | --             |

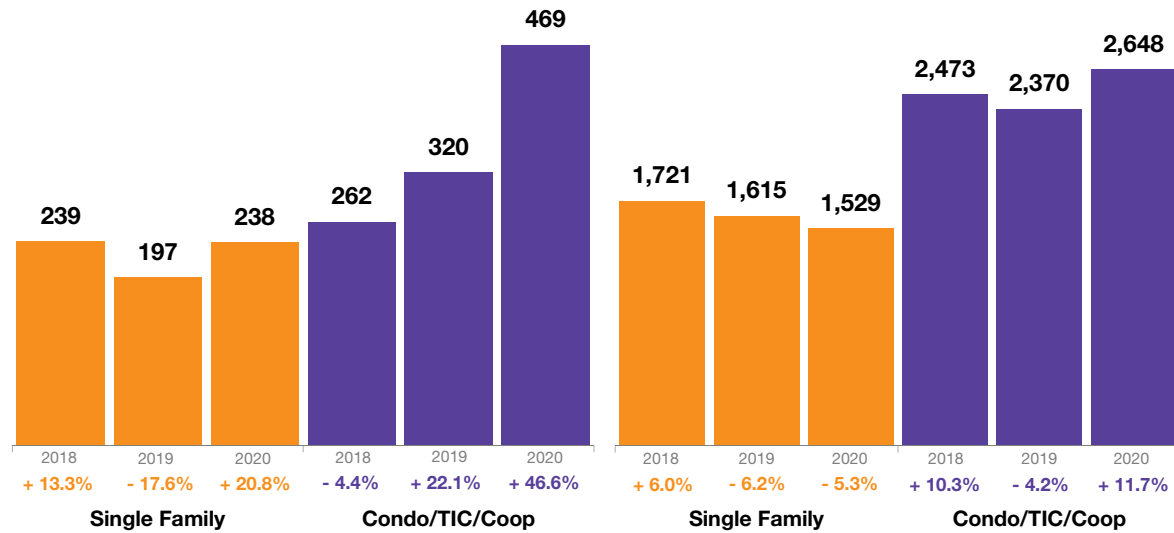
# New Listings

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



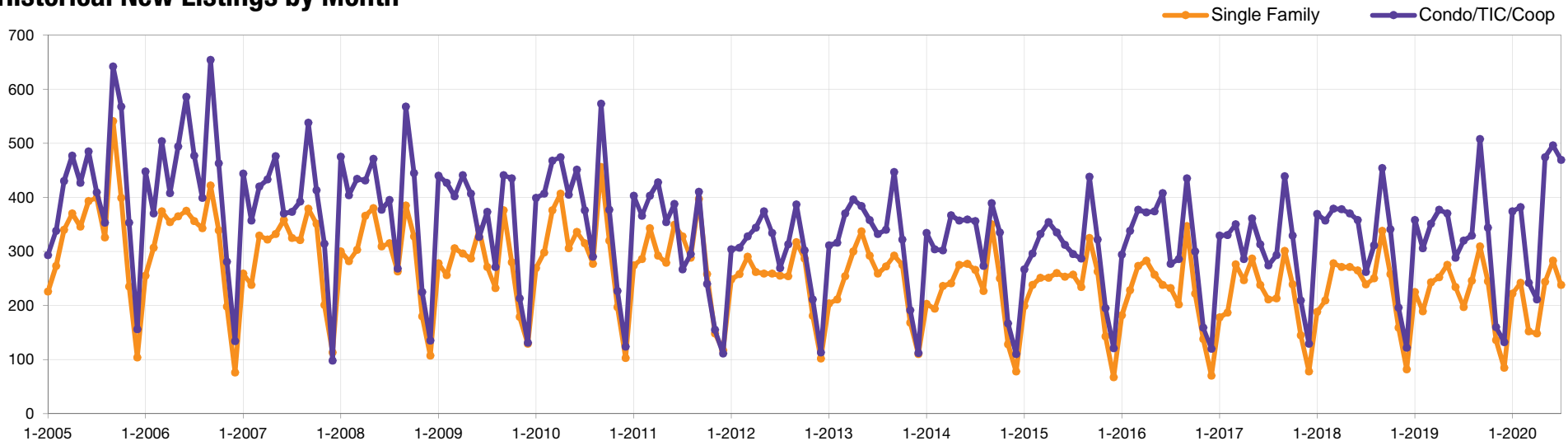
## July

## Year to Date



| New Listings    | Single Family | Year-Over-Year Change | Condo/TIC/Coop | Year-Over-Year Change |
|-----------------|---------------|-----------------------|----------------|-----------------------|
| Aug-2019        | 246           | -1.6%                 | 329            | +5.8%                 |
| Sep-2019        | 309           | -8.6%                 | 508            | +11.9%                |
| Oct-2019        | 245           | -5.0%                 | 344            | +0.9%                 |
| Nov-2019        | 136           | -14.5%                | 160            | -18.4%                |
| Dec-2019        | 85            | +3.7%                 | 132            | +8.2%                 |
| Jan-2020        | 222           | -1.3%                 | 374            | +4.5%                 |
| Feb-2020        | 242           | +28.0%                | 382            | +24.8%                |
| Mar-2020        | 152           | -37.4%                | 242            | -31.1%                |
| Apr-2020        | 148           | -41.3%                | 211            | -44.0%                |
| May-2020        | 244           | -11.3%                | 474            | +28.1%                |
| Jun-2020        | 283           | +20.9%                | 496            | +72.2%                |
| <b>Jul-2020</b> | <b>238</b>    | <b>+20.8%</b>         | <b>469</b>     | <b>+46.6%</b>         |
| 12-Month Avg    | 213           | -5.6%                 | 343            | +8.6%                 |

## Historical New Listings by Month



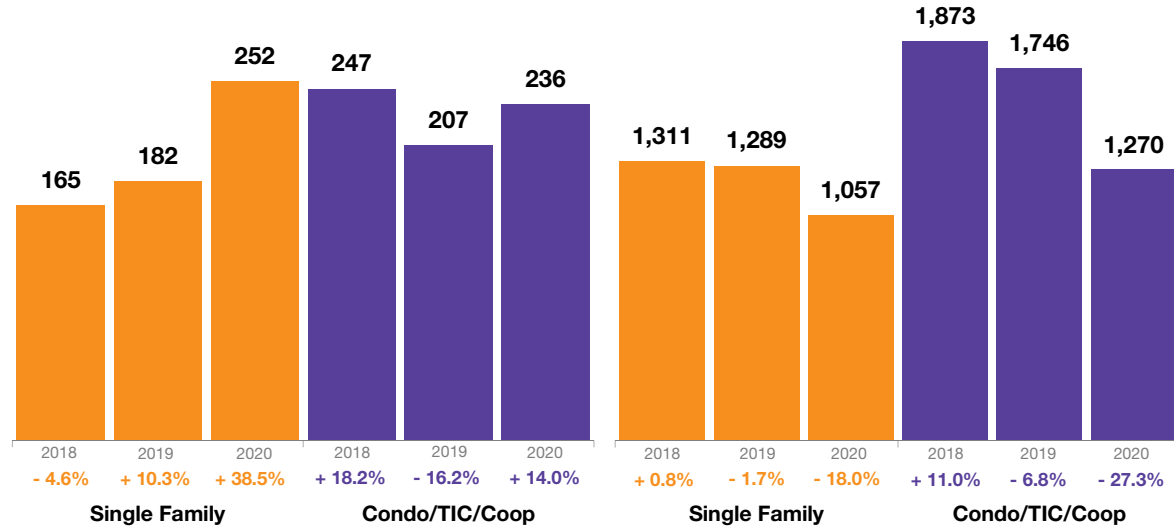
# Pending Sales

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



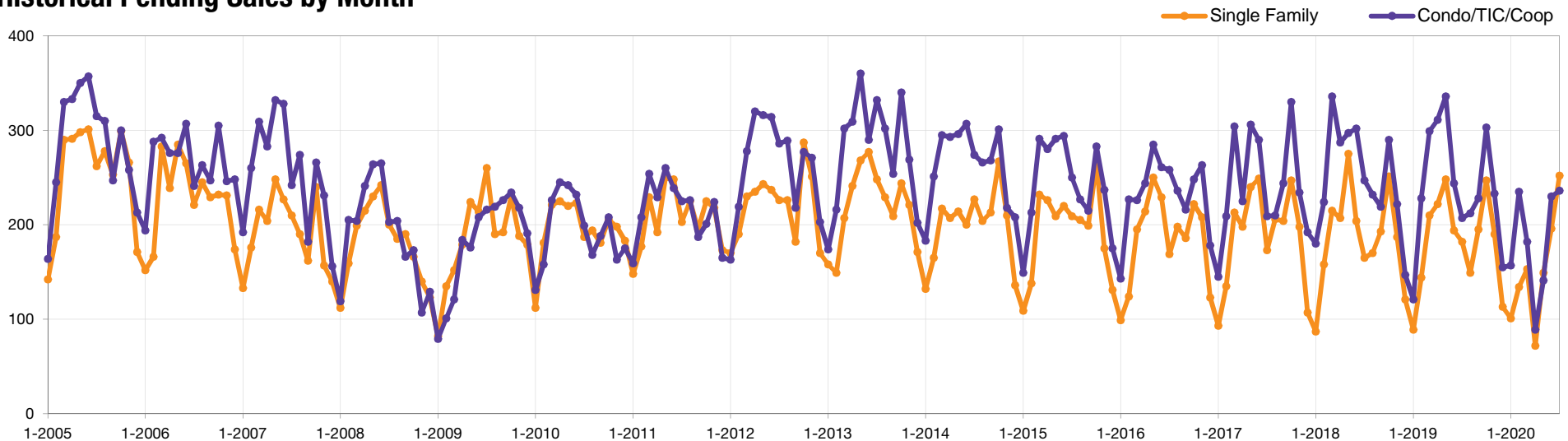
## July

## Year to Date



| Pending Sales   | Single Family | Year-Over-Year Change | Condo/TIC/Coop | Year-Over-Year Change |
|-----------------|---------------|-----------------------|----------------|-----------------------|
| Aug-2019        | 149           | -12.4%                | 212            | -8.6%                 |
| Sep-2019        | 195           | +1.0%                 | 228            | +4.1%                 |
| Oct-2019        | 247           | -1.6%                 | 303            | +4.5%                 |
| Nov-2019        | 190           | +1.6%                 | 233            | +5.0%                 |
| Dec-2019        | 113           | -6.6%                 | 155            | +5.4%                 |
| Jan-2020        | 101           | +13.5%                | 157            | +29.8%                |
| Feb-2020        | 134           | -6.9%                 | 235            | +3.1%                 |
| Mar-2020        | 153           | -27.1%                | 182            | -39.1%                |
| Apr-2020        | 72            | -67.6%                | 89             | -71.4%                |
| May-2020        | 149           | -39.9%                | 141            | -58.0%                |
| Jun-2020        | 196           | +1.0%                 | 230            | -5.7%                 |
| <b>Jul-2020</b> | <b>252</b>    | <b>+38.5%</b>         | <b>236</b>     | <b>+14.0%</b>         |
| 12-Month Avg    | 163           | -11.8%                | 200            | -15.9%                |

## Historical Pending Sales by Month

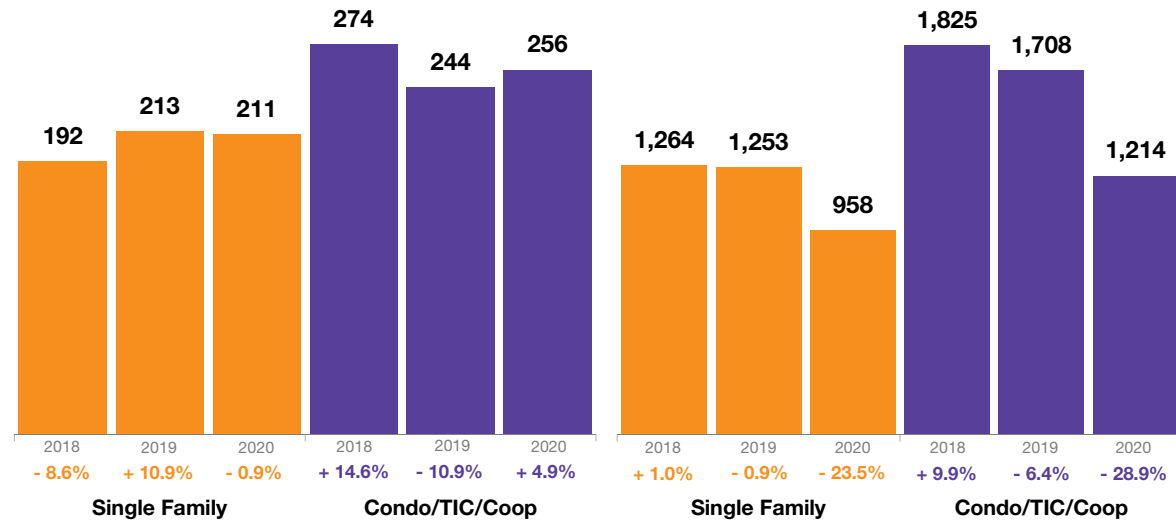


# Sold Listings

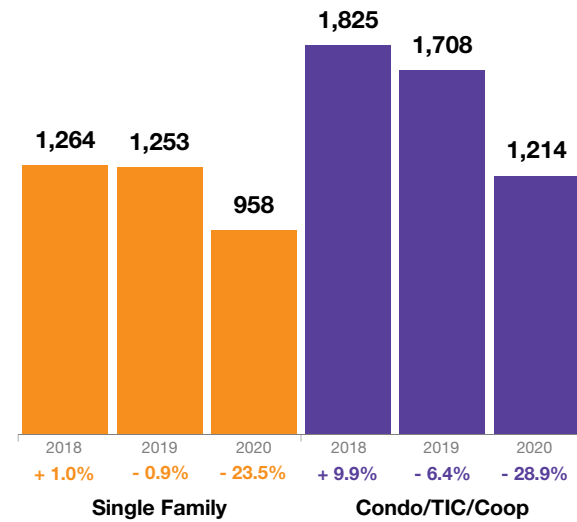
A count of the actual sales that closed in a given month.



## July

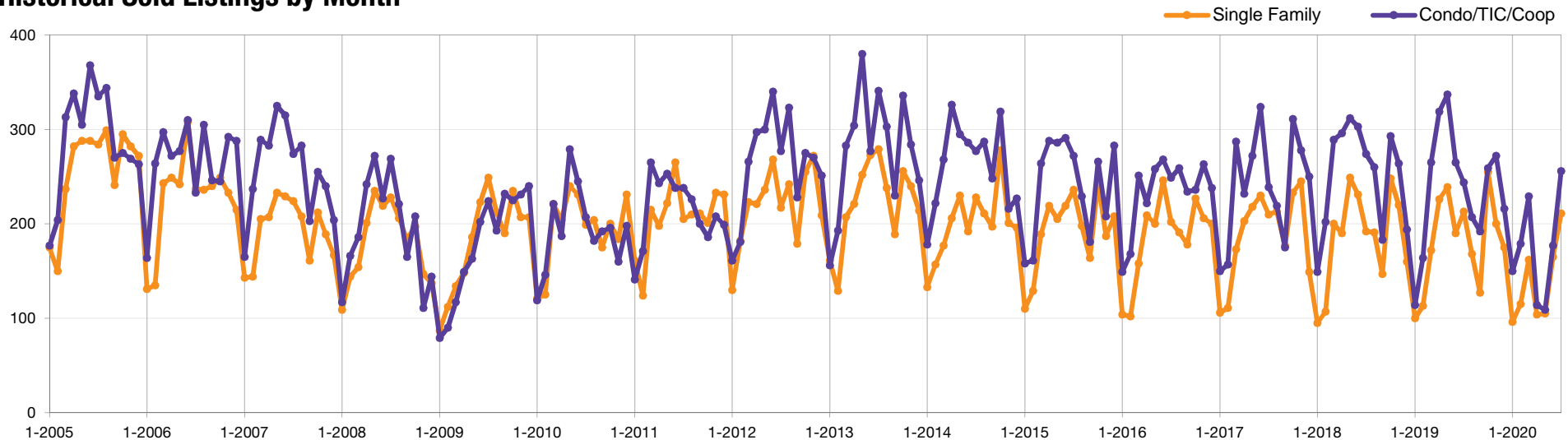


## Year to Date



| Sold Listings   | Single Family | Year-Over-Year Change | Condo/TIC/Coop | Year-Over-Year Change |
|-----------------|---------------|-----------------------|----------------|-----------------------|
| Aug-2019        | 168           | -12.0%                | 207            | -20.4%                |
| Sep-2019        | 127           | -13.6%                | 192            | +4.9%                 |
| Oct-2019        | 255           | +2.8%                 | 259            | -11.6%                |
| Nov-2019        | 200           | -9.1%                 | 272            | +3.0%                 |
| Dec-2019        | 175           | +9.4%                 | 216            | +11.3%                |
| Jan-2020        | 96            | -4.0%                 | 150            | +31.6%                |
| Feb-2020        | 115           | +1.8%                 | 179            | +9.1%                 |
| Mar-2020        | 162           | -5.8%                 | 229            | -13.6%                |
| Apr-2020        | 104           | -54.0%                | 114            | -64.3%                |
| May-2020        | 105           | -56.1%                | 109            | -67.7%                |
| Jun-2020        | 165           | -13.2%                | 177            | -33.2%                |
| <b>Jul-2020</b> | <b>211</b>    | <b>-0.9%</b>          | <b>256</b>     | <b>+4.9%</b>          |
| 12-Month Avg    | 157           | -15.1%                | 197            | -18.7%                |

## Historical Sold Listings by Month

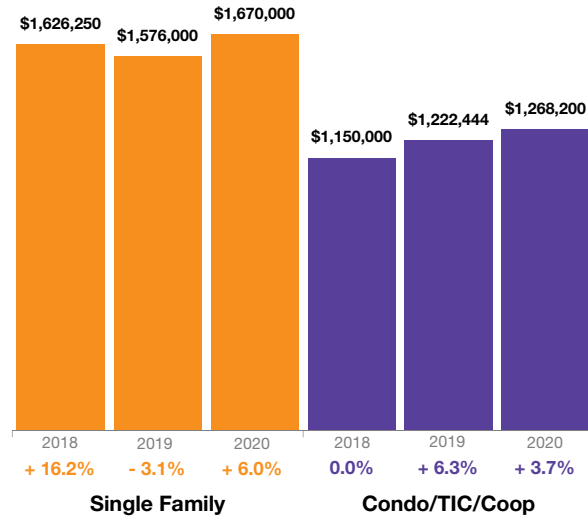


# Median Sales Price

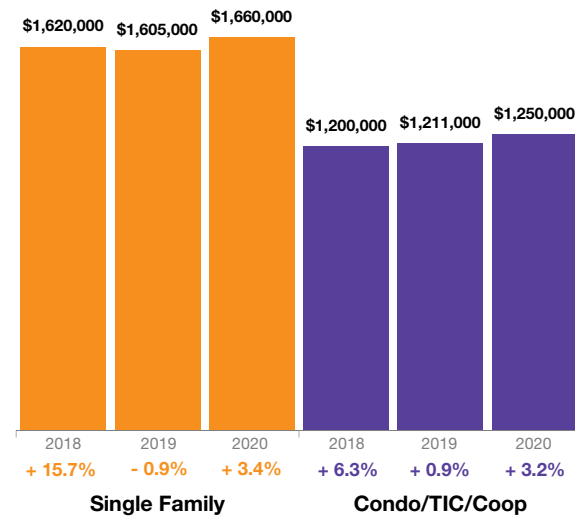
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



## July



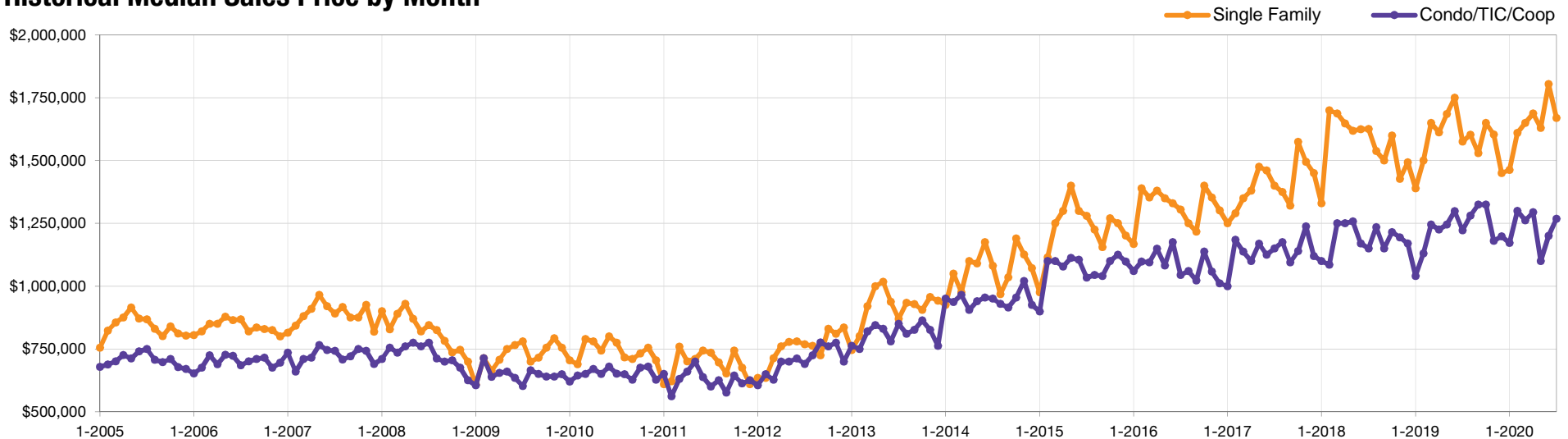
## Year to Date



| Median Sales Price | Single Family      | Year-Over-Year Change | Condo/TIC/Coop     | Year-Over-Year Change |
|--------------------|--------------------|-----------------------|--------------------|-----------------------|
| Aug-2019           | \$1,602,500        | +4.2%                 | \$1,281,250        | +3.8%                 |
| Sep-2019           | \$1,530,000        | +2.0%                 | \$1,325,000        | +15.2%                |
| Oct-2019           | \$1,650,000        | +3.1%                 | \$1,325,000        | +9.1%                 |
| Nov-2019           | \$1,604,000        | +12.4%                | \$1,180,000        | -1.1%                 |
| Dec-2019           | \$1,450,000        | -2.8%                 | \$1,198,283        | +2.4%                 |
| Jan-2020           | \$1,462,500        | +5.3%                 | \$1,172,000        | +12.7%                |
| Feb-2020           | \$1,610,000        | +7.3%                 | \$1,300,000        | +15.0%                |
| Mar-2020           | \$1,650,000        | 0.0%                  | \$1,262,000        | +1.4%                 |
| Apr-2020           | \$1,687,000        | +4.6%                 | \$1,294,000        | +5.6%                 |
| May-2020           | \$1,630,000        | -3.3%                 | \$1,100,222        | -11.6%                |
| Jun-2020           | \$1,805,000        | +3.1%                 | \$1,200,000        | -7.6%                 |
| <b>Jul-2020</b>    | <b>\$1,670,000</b> | <b>+6.0%</b>          | <b>\$1,268,200</b> | <b>+3.7%</b>          |
| 12-Month Avg*      | \$1,625,000        | +3.2%                 | \$1,255,000        | +4.5%                 |

\* Median Sales Price for all properties from August 2019 through July 2020. This is not the average of the individual figures above.

## Historical Median Sales Price by Month



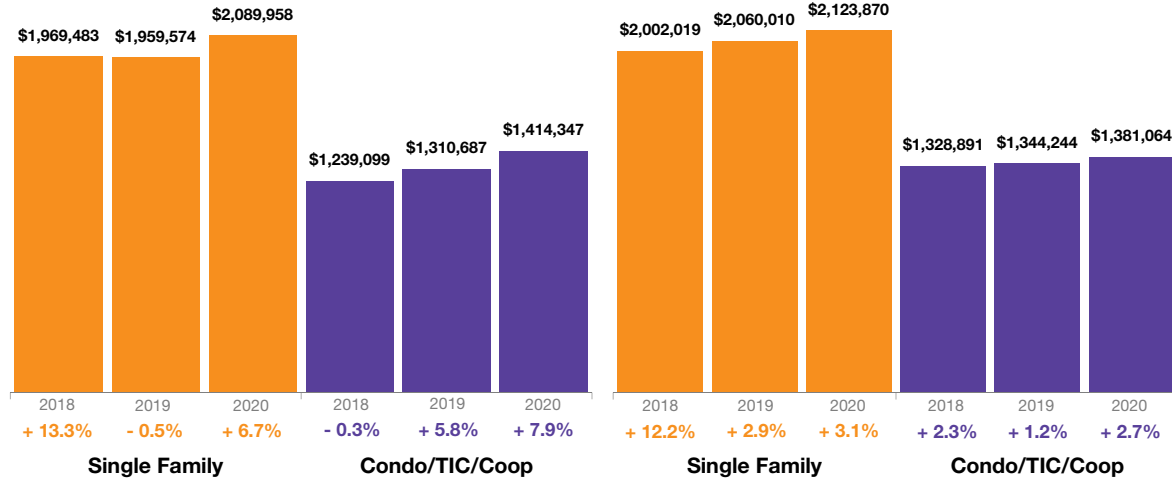
# Average Sales Price

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



## July

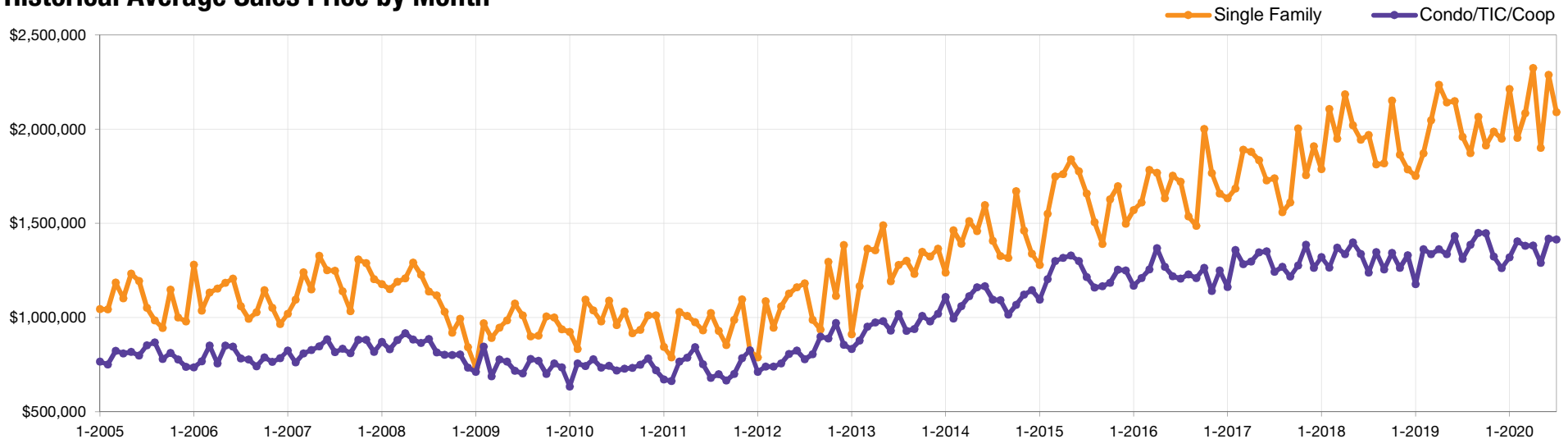
## Year to Date



| Avg. Sales Price | Single Family      | Year-Over-Year Change | Condo/TIC/Coop     | Year-Over-Year Change |
|------------------|--------------------|-----------------------|--------------------|-----------------------|
| Aug-2019         | \$1,872,478        | +3.3%                 | \$1,386,808        | +2.9%                 |
| Sep-2019         | \$2,065,723        | +13.6%                | \$1,449,604        | +15.4%                |
| Oct-2019         | \$1,912,555        | -11.1%                | \$1,447,421        | +7.8%                 |
| Nov-2019         | \$1,986,456        | +6.6%                 | \$1,322,998        | +4.7%                 |
| Dec-2019         | \$1,948,749        | +9.1%                 | \$1,261,689        | -5.1%                 |
| Jan-2020         | \$2,212,609        | +26.3%                | \$1,319,209        | +12.1%                |
| Feb-2020         | \$1,953,875        | +4.4%                 | \$1,404,496        | +3.0%                 |
| Mar-2020         | \$2,084,487        | +1.9%                 | \$1,380,103        | +3.3%                 |
| Apr-2020         | \$2,324,543        | +4.0%                 | \$1,381,974        | +1.4%                 |
| May-2020         | \$1,900,955        | -11.2%                | \$1,289,927        | -3.4%                 |
| Jun-2020         | \$2,288,124        | +6.5%                 | \$1,418,428        | -0.9%                 |
| <b>Jul-2020</b>  | <b>\$2,089,958</b> | <b>+6.7%</b>          | <b>\$1,414,347</b> | <b>+7.9%</b>          |
| 12-Month Avg*    | \$2,038,032        | +2.2%                 | \$1,376,808        | +3.5%                 |

\* Avg. Sales Price for all properties from August 2019 through July 2020. This is not the average of the individual figures above.

## Historical Average Sales Price by Month





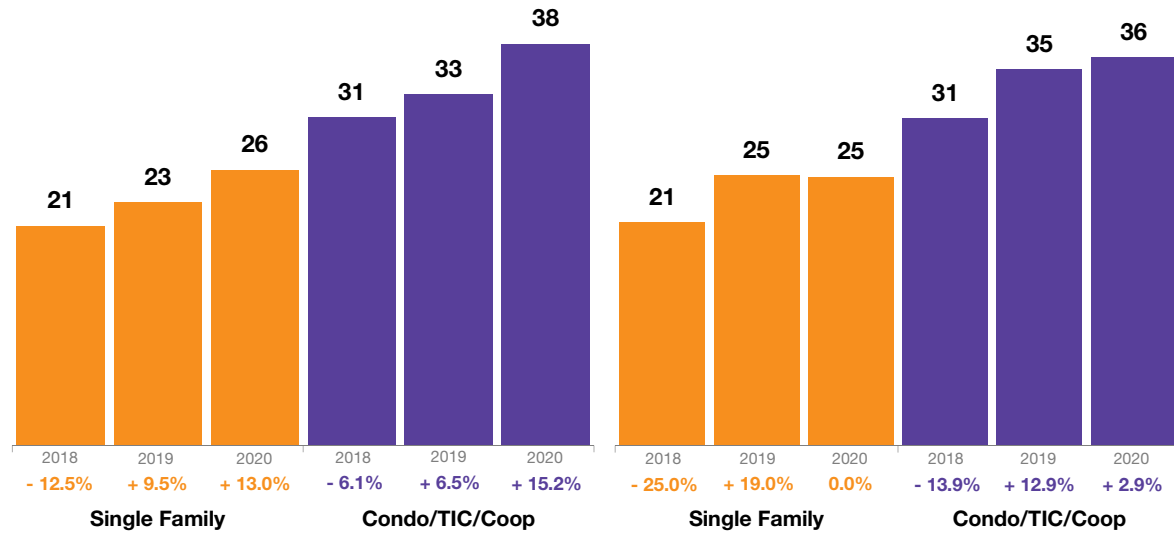
# Days on Market Until Sale

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



## July

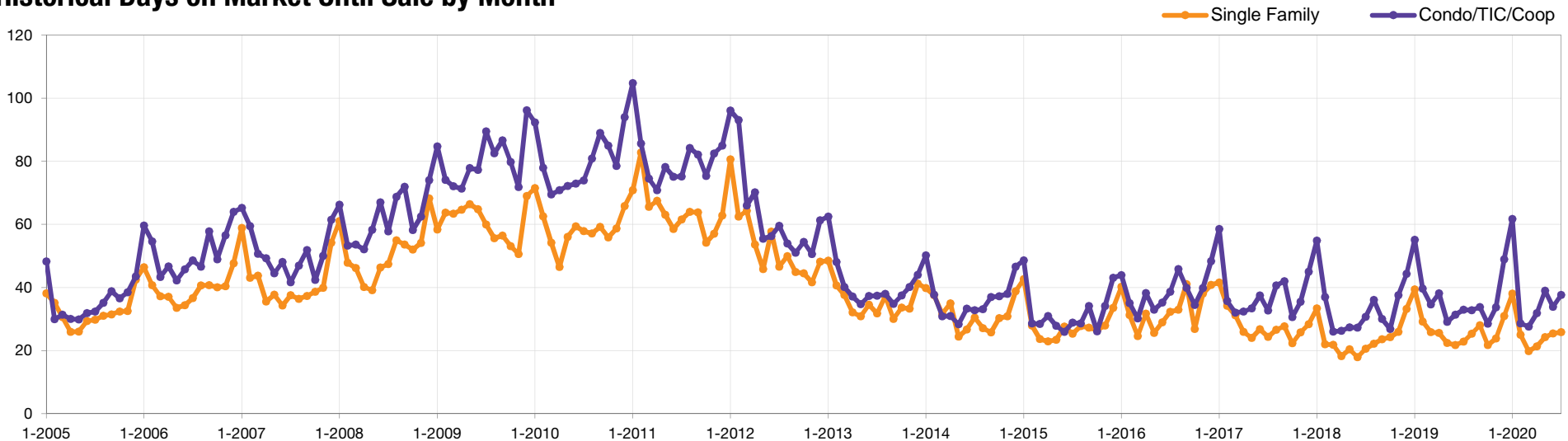
## Year to Date



| Days on Market  | Single Family | Year-Over-Year Change | Condo/TIC/Coop | Year-Over-Year Change |
|-----------------|---------------|-----------------------|----------------|-----------------------|
| Aug-2019        | 25            | +13.6%                | 33             | -8.3%                 |
| Sep-2019        | 28            | +16.7%                | 34             | +13.3%                |
| Oct-2019        | 22            | -8.3%                 | 28             | +3.7%                 |
| Nov-2019        | 24            | -7.7%                 | 34             | -10.5%                |
| Dec-2019        | 31            | -6.1%                 | 49             | +11.4%                |
| Jan-2020        | 38            | -2.6%                 | 62             | +12.7%                |
| Feb-2020        | 25            | -13.8%                | 29             | -27.5%                |
| Mar-2020        | 20            | -23.1%                | 28             | -20.0%                |
| Apr-2020        | 21            | -19.2%                | 32             | -15.8%                |
| May-2020        | 24            | +9.1%                 | 39             | +34.5%                |
| Jun-2020        | 25            | +13.6%                | 34             | +9.7%                 |
| <b>Jul-2020</b> | <b>26</b>     | <b>+13.0%</b>         | <b>38</b>      | <b>+15.2%</b>         |
| 12-Month Avg*   | 25            | -0.6%                 | 36             | +2.5%                 |

\* Days on Market for all properties from August 2019 through July 2020. This is not the average of the individual figures above.

## Historical Days on Market Until Sale by Month

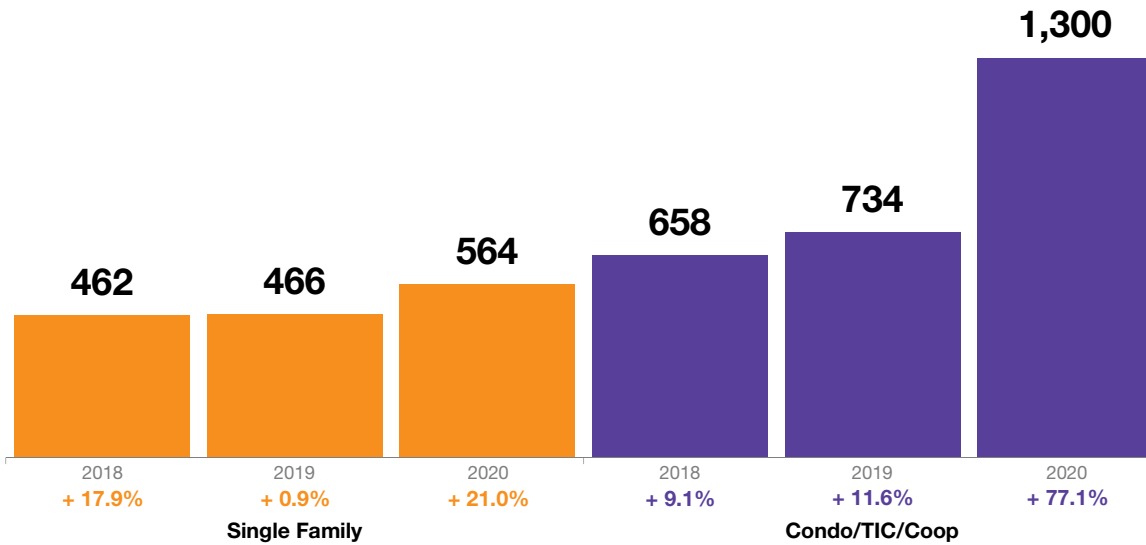


# Inventory of Active Listings

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



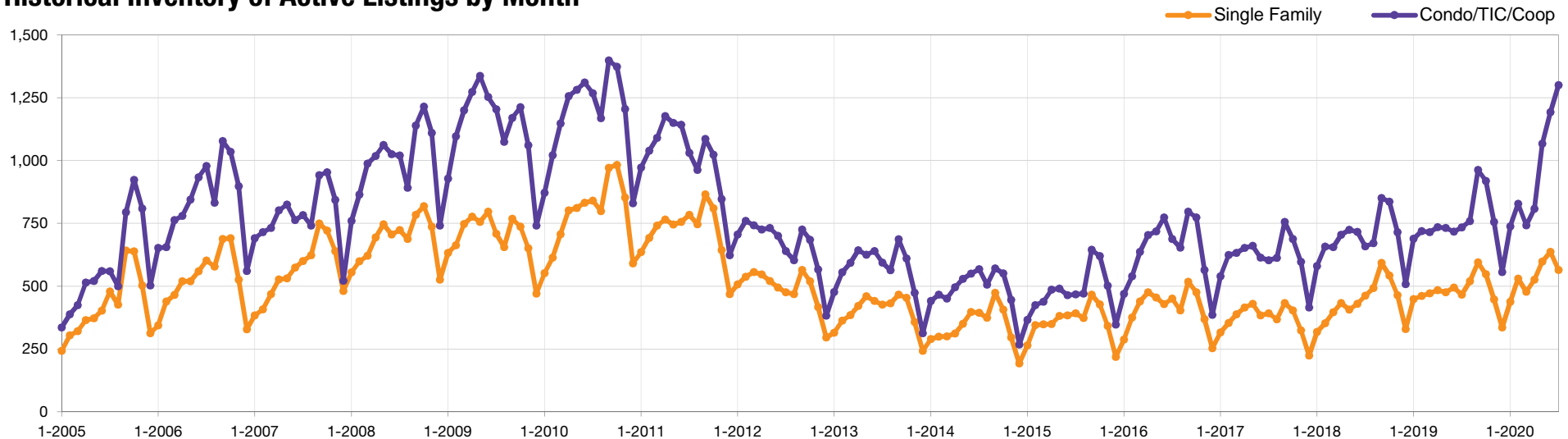
## July



| Active Listings | Single Family | Year-Over-Year Change | Condo/TIC/Coop | Year-Over-Year Change |
|-----------------|---------------|-----------------------|----------------|-----------------------|
| Aug-2019        | 519           | +5.5%                 | 759            | +13.1%                |
| Sep-2019        | 595           | +0.3%                 | 963            | +13.2%                |
| Oct-2019        | 548           | +1.1%                 | 919            | +9.9%                 |
| Nov-2019        | 447           | -3.7%                 | 756            | +5.7%                 |
| Dec-2019        | 335           | +1.8%                 | 556            | +9.4%                 |
| Jan-2020        | 438           | -2.2%                 | 738            | +7.1%                 |
| Feb-2020        | 530           | +15.0%                | 828            | +15.2%                |
| Mar-2020        | 478           | +1.5%                 | 742            | +3.8%                 |
| Apr-2020        | 526           | +8.7%                 | 808            | +9.9%                 |
| May-2020        | 598           | +25.9%                | 1,067          | +45.8%                |
| Jun-2020        | 636           | +28.7%                | 1,193          | +66.4%                |
| <b>Jul-2020</b> | <b>564</b>    | <b>+21.0%</b>         | <b>1,300</b>   | <b>+77.1%</b>         |
| 12-Month Avg*   | 518           | +8.7%                 | 886            | +23.3%                |

\* Active Listings for all properties from August 2019 through July 2020. This is not the average of the individual figures above.

## Historical Inventory of Active Listings by Month

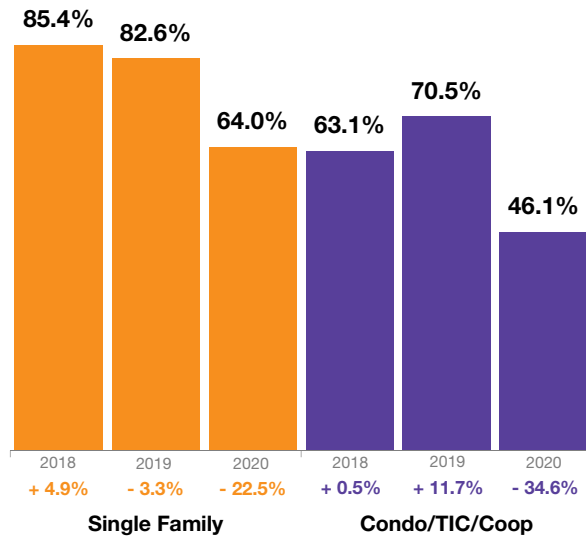


# % of Properties Sold Over List Price

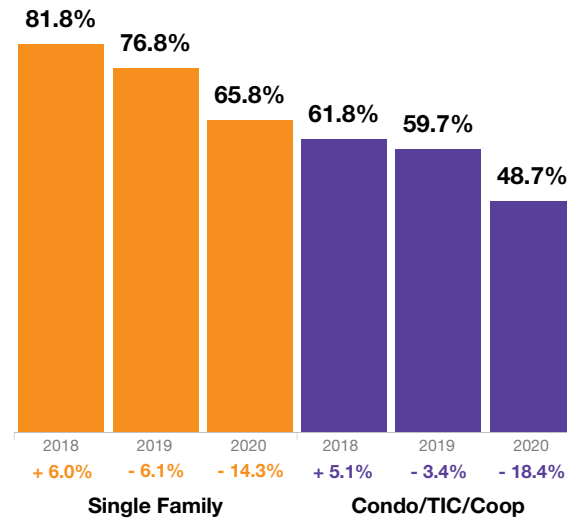


Percentage found when dividing the number of properties sold by properties sold over its original list price, not accounting for seller concessions.

## July



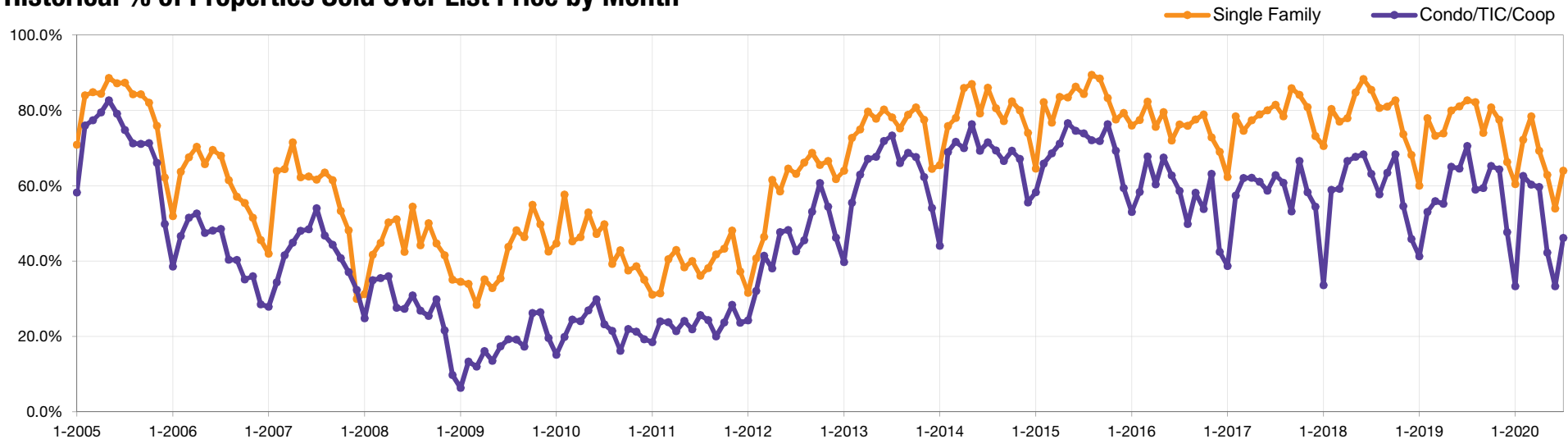
## Year to Date



| % of Properties Sold Over List Price | Single Family | Year-Over-Year Change | Condo/TIC/Coop | Year-Over-Year Change |
|--------------------------------------|---------------|-----------------------|----------------|-----------------------|
| Aug-2019                             | 82.1%         | +1.9%                 | 58.9%          | +2.1%                 |
| Sep-2019                             | 74.0%         | -8.6%                 | 59.4%          | -6.3%                 |
| Oct-2019                             | 80.8%         | -2.3%                 | 65.3%          | -4.4%                 |
| Nov-2019                             | 77.5%         | +5.3%                 | 64.3%          | +18.0%                |
| Dec-2019                             | 66.3%         | -2.6%                 | 47.7%          | +3.9%                 |
| Jan-2020                             | 60.4%         | +0.7%                 | 33.3%          | -19.2%                |
| Feb-2020                             | 72.2%         | -7.3%                 | 62.6%          | +18.1%                |
| Mar-2020                             | 78.4%         | +7.0%                 | 60.3%          | +8.1%                 |
| Apr-2020                             | 69.2%         | -6.4%                 | 59.6%          | +8.0%                 |
| May-2020                             | 62.9%         | -21.3%                | 42.2%          | -35.1%                |
| Jun-2020                             | 53.9%         | -33.5%                | 33.3%          | -48.4%                |
| <b>Jul-2020</b>                      | <b>64.0%</b>  | <b>-22.5%</b>         | <b>46.1%</b>   | <b>-34.6%</b>         |
| 12-Month Avg                         | 71.1%         | -7.8%                 | 54.0%          | -8.9%                 |

\* % of Properties Sold Over List Price for all properties from August 2019 through July 2020. This is not the average of the individual figures above.

## Historical % of Properties Sold Over List Price by Month

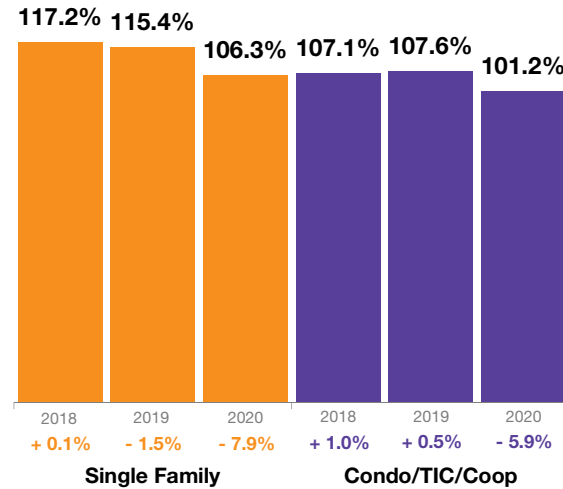


# % of List Price Received

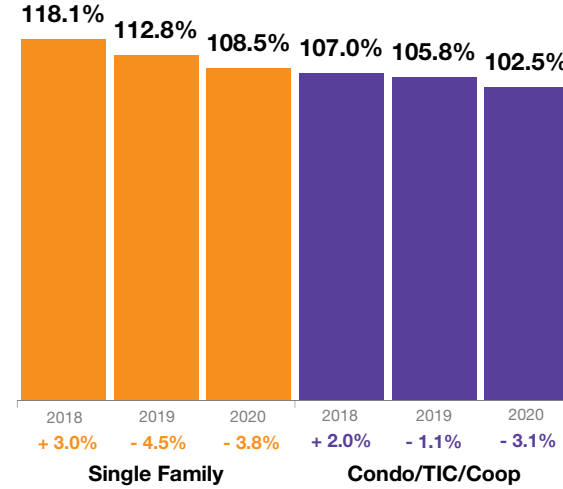
Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



## July



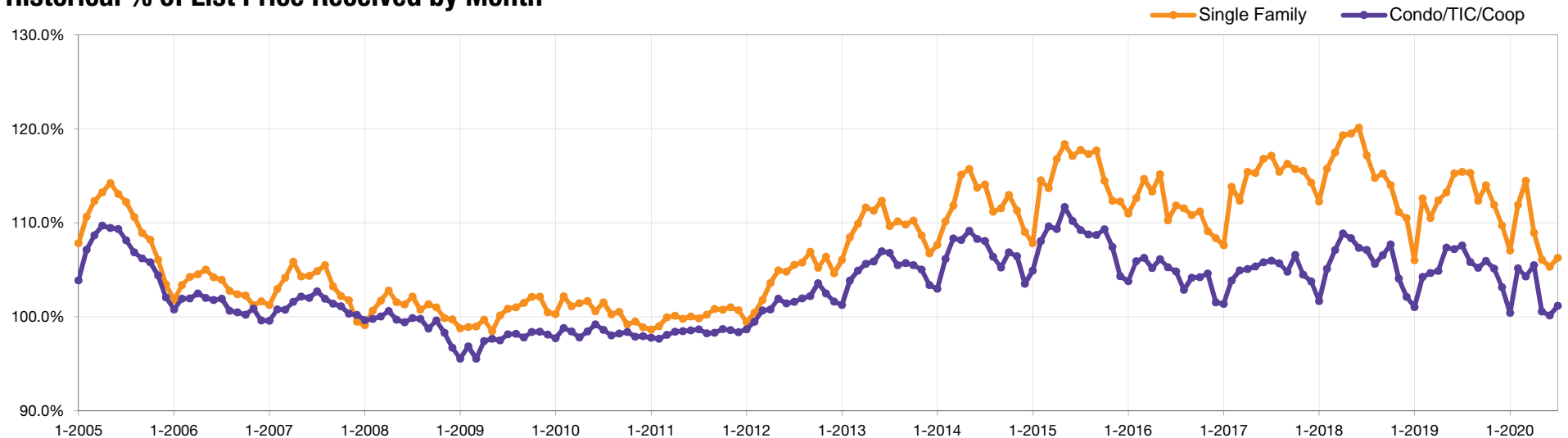
## Year to Date



| % of List Price Received | Single Family | Year-Over-Year Change | Condo/TIC/Coop | Year-Over-Year Change |
|--------------------------|---------------|-----------------------|----------------|-----------------------|
| Aug-2019                 | 115.3%        | +0.4%                 | 105.8%         | +0.2%                 |
| Sep-2019                 | 112.4%        | -2.5%                 | 105.2%         | -1.2%                 |
| Oct-2019                 | 114.0%        | 0.0%                  | 105.9%         | -1.7%                 |
| Nov-2019                 | 111.9%        | +0.6%                 | 105.1%         | +1.0%                 |
| Dec-2019                 | 109.7%        | -0.7%                 | 103.1%         | +1.0%                 |
| Jan-2020                 | 107.1%        | +1.0%                 | 100.4%         | -0.6%                 |
| Feb-2020                 | 111.9%        | -0.6%                 | 105.2%         | +1.0%                 |
| Mar-2020                 | 114.5%        | +3.6%                 | 104.3%         | -0.4%                 |
| Apr-2020                 | 109.0%        | -3.0%                 | 105.5%         | +0.6%                 |
| May-2020                 | 106.1%        | -6.3%                 | 100.6%         | -6.3%                 |
| Jun-2020                 | 105.3%        | -8.7%                 | 100.2%         | -6.5%                 |
| <b>Jul-2020</b>          | <b>106.3%</b> | <b>-7.9%</b>          | <b>101.2%</b>  | <b>-5.9%</b>          |
| 12-Month Avg*            | 110.6%        | -2.0%                 | 103.7%         | -1.8%                 |

\* % of List Price Received for all properties from August 2019 through July 2020. This is not the average of the individual figures above.

## Historical % of List Price Received by Month

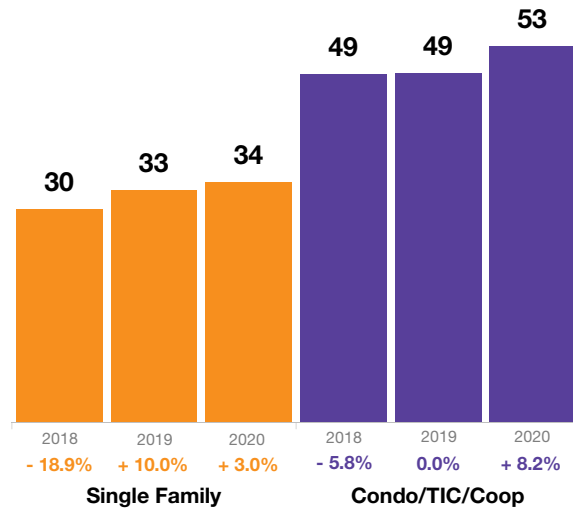


# Housing Affordability Ratio

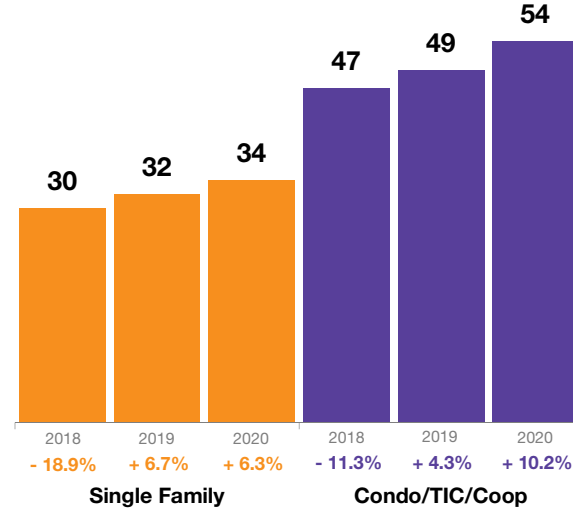


This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.

## July



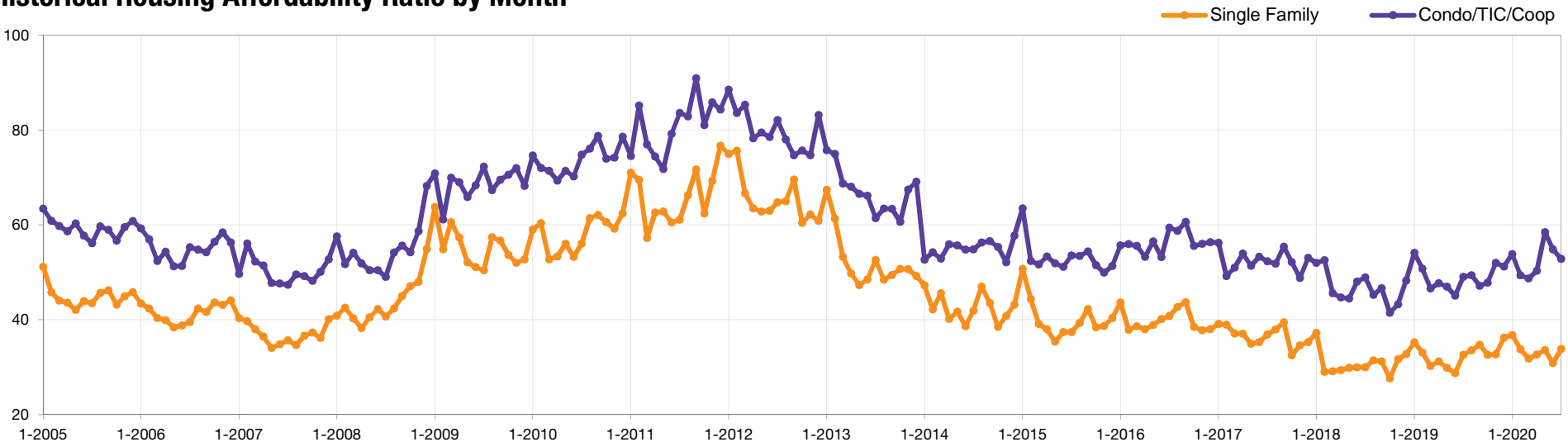
## Year to Date



| Affordability Ratio | Single Family | Year-Over-Year Change | Condo/TIC/Coop | Year-Over-Year Change |
|---------------------|---------------|-----------------------|----------------|-----------------------|
| Aug-2019            | 34            | +9.7%                 | 49             | +8.9%                 |
| Sep-2019            | 35            | +12.9%                | 47             | 0.0%                  |
| Oct-2019            | 33            | +17.9%                | 48             | +17.1%                |
| Nov-2019            | 33            | +3.1%                 | 52             | +20.9%                |
| Dec-2019            | 36            | +9.1%                 | 51             | +6.3%                 |
| Jan-2020            | 37            | +5.7%                 | 54             | 0.0%                  |
| Feb-2020            | 34            | +3.0%                 | 49             | -3.9%                 |
| Mar-2020            | 32            | +6.7%                 | 49             | +4.3%                 |
| Apr-2020            | 33            | +6.5%                 | 50             | +4.2%                 |
| May-2020            | 34            | +13.3%                | 58             | +23.4%                |
| Jun-2020            | 31            | +6.9%                 | 55             | +22.2%                |
| <b>Jul-2020</b>     | <b>34</b>     | <b>+3.0%</b>          | <b>53</b>      | <b>+8.2%</b>          |
| 12-Month Avg*       | 34            | +8.6%                 | 31             | +12.5%                |

\* Affordability Ratio for all properties from August 2019 through July 2020. This is not the average of the individual figures above.

## Historical Housing Affordability Ratio by Month

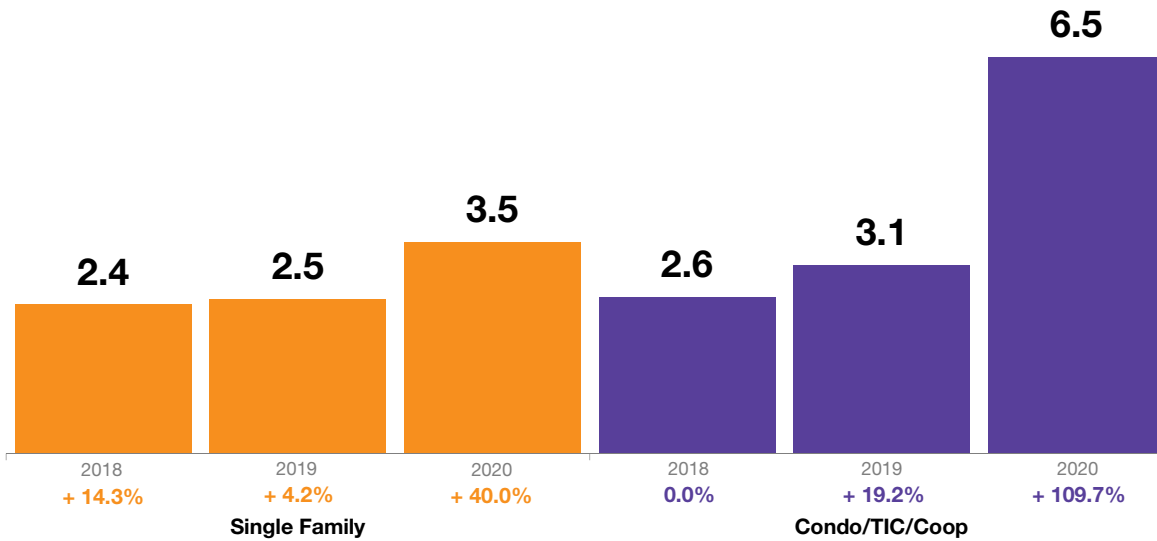


# Months Supply of Inventory



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.

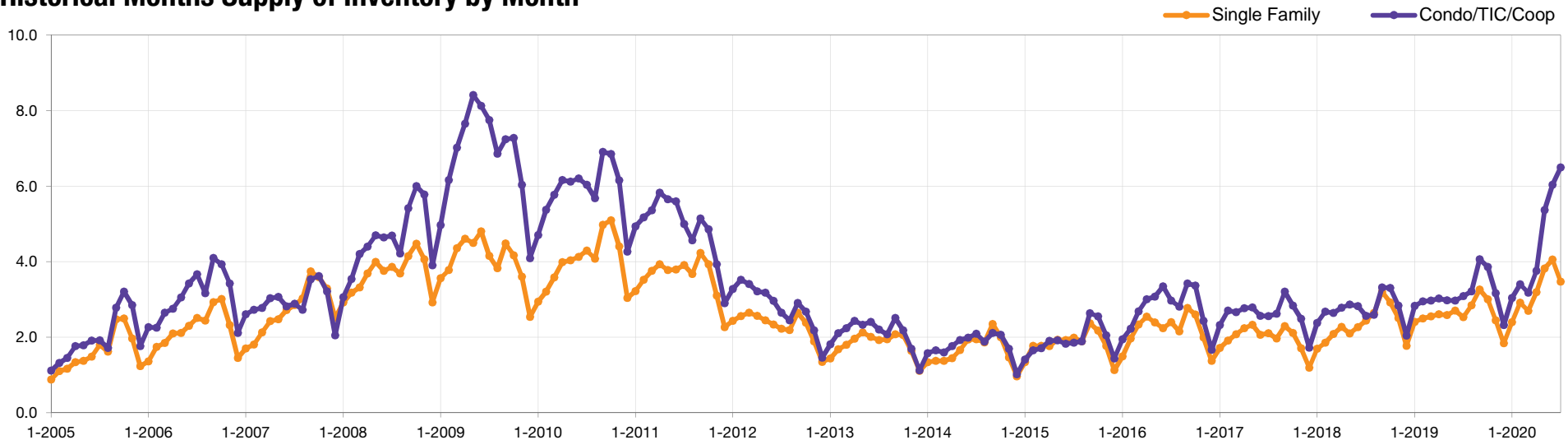
## July



| Months Supply   | Single Family | Year-Over-Year Change | Condo/TIC/Coop | Year-Over-Year Change |
|-----------------|---------------|-----------------------|----------------|-----------------------|
| Aug-2019        | 2.8           | +7.7%                 | 3.2            | +23.1%                |
| Sep-2019        | 3.3           | +3.1%                 | 4.1            | +24.2%                |
| Oct-2019        | 3.0           | +3.4%                 | 3.9            | +18.2%                |
| Nov-2019        | 2.4           | -4.0%                 | 3.2            | +14.3%                |
| Dec-2019        | 1.8           | 0.0%                  | 2.3            | +15.0%                |
| Jan-2020        | 2.4           | 0.0%                  | 3.0            | +7.1%                 |
| Feb-2020        | 2.9           | +16.0%                | 3.4            | +17.2%                |
| Mar-2020        | 2.7           | +3.8%                 | 3.2            | +6.7%                 |
| Apr-2020        | 3.2           | +23.1%                | 3.8            | +26.7%                |
| May-2020        | 3.8           | +46.2%                | 5.4            | +80.0%                |
| Jun-2020        | 4.1           | +51.9%                | 6.0            | +100.0%               |
| <b>Jul-2020</b> | <b>3.5</b>    | <b>+40.0%</b>         | <b>6.5</b>     | <b>+109.7%</b>        |
| 12-Month Avg*   | 3.0           | +16.3%                | 4.0            | +37.3%                |

\* Months Supply for all properties from August 2019 through July 2020. This is not the average of the individual figures above.

## Historical Months Supply of Inventory by Month



# All Properties Activity Overview

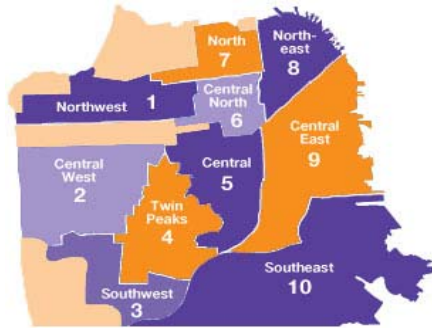


Key metrics by report month and for year-to-date (YTD) starting from the first of the year.

| Key Metrics                                 | Historical Sparkbars | 7-2019      | 7-2020             | Percent Change | YTD 2019    | YTD 2020           | Percent Change |
|---|----------------------|-------------|--------------------|----------------|-------------|--------------------|----------------|
| <b>New Listings</b>                         |                      | 517         | <b>707</b>         | + 36.8%        | 3,985       | <b>4,177</b>       | + 4.8%         |
| <b>Pending Sales</b>                        |                      | 389         | <b>488</b>         | + 25.4%        | 3,035       | <b>2,327</b>       | - 23.3%        |
| <b>Sold Listings</b>                        |                      | 457         | <b>467</b>         | + 2.2%         | 2,961       | <b>2,172</b>       | - 26.6%        |
| <b>Median Sales Price</b>                   |                      | \$1,385,000 | <b>\$1,450,000</b> | + 4.7%         | \$1,375,000 | <b>\$1,440,000</b> | + 4.7%         |
| <b>Avg. Sales Price</b>                     |                      | \$1,613,122 | <b>\$1,719,602</b> | + 6.6%         | \$1,647,133 | <b>\$1,708,692</b> | + 3.7%         |
| <b>Days on Market</b>                       |                      | 28          | <b>32</b>          | + 14.3%        | 31          | <b>31</b>          | 0.0%           |
| <b>Active Listings</b>                      |                      | 1,200       | <b>1,864</b>       | + 55.3%        | --          | --                 | --             |
| <b>% of Properties Sold Over List Price</b> |                      | 76.1%       | <b>54.2%</b>       | - 28.8%        | 66.9%       | <b>56.2%</b>       | - 16.0%        |
| <b>% of List Price Received</b>             |                      | 111.2%      | <b>103.5%</b>      | - 6.9%         | 108.7%      | <b>105.1%</b>      | - 3.3%         |
| <b>Affordability Ratio</b>                  |                      | 37          | <b>39</b>          | + 5.4%         | 37          | <b>40</b>          | + 8.1%         |
| <b>Months Supply</b>                        |                      | 2.8         | <b>5.1</b>         | + 82.1%        | --          | --                 | --             |

# Activity by District

Key metrics by report month for the districts of San Francisco.



- SF District 1: Northwest (Sea Cliff, Lake, Jordan Park / Laurel Heights, Outer Richmond, Central Richmond, Inner Richmond, Lone Mountain)
- SF District 2: Central West (Outer Sunset, Central Sunset, Inner Sunset, Outer Parkside, Parkside, Inner Parkside, Golden Gate Heights)
- SF District 3: Southwest (Pine Lake Park, Lake Shore, Merced Manor, Stonestown, Lakeside, Merced Heights, Ingleside, Ingleside Heights, Oceanview)
- SF District 4: Twin Peaks W (Forest Hill (& Ext), W Portal, St Francis Wd, Balboa Terr, Mt Dav Manor, Ingleside Terr, Monterey Hts, Wstwd Pk & H'Inds, Shrwrd Fst, Miraloma Pk, Dmnd Hts, Mdtwn Terr)
- SF District 5: Central (Haight Ashbury, Cole Vly / Prnssus Hts, Clarndn Hts, Corona Hts, Twin Pks, Glen Pk, Noe Vly, Eureka Vly / Dolores Hts, Mission Dolores, Duboce Trngl, Buena Vista / Ashbury Hts)
- SF District 6: Central North (Lower Pacific Heights, Anza Vista, Western Addition, North Panhandle, Alamo Square, Hayes Valley)
- SF District 7: North (Marina, Cow Hollow, Presidio Heights, Pacific Heights)
- SF District 8: Northeast (North Waterfront, North Beach, Russian Hill, Telegraph Hill, Nob Hill, Financial District / Barbary Coast, Downtown, Van Ness / Civic Center, Tenderloin)
- SF District 9: Central East (Yerba Buena, South Beach, South of Market, Mission Bay, Inner Mission, Potrero Hill, Central Waterfront / Dogpatch, Bernal Heights)
- SF District 10: Southeast (Outer Mission, Mission Terr, Excelsior, Portola, Bayview, Silver Terr, Hunters Pt, Candlestick Pt, Bayview Hts, Little Hollywood, Visitation Vly, Crocker Amazon)

|                       | Active Listings |        |                | Sold Listings |        |                | Median Sales Price |             |               | Days on Market |        |                | Months Supply |        |                |
|-----------------------|-----------------|--------|----------------|---------------|--------|----------------|--------------------|-------------|---------------|----------------|--------|----------------|---------------|--------|----------------|
|                       | 7-2019          | 7-2020 | + / -          | 7-2019        | 7-2020 | + / -          | 7-2019             | 7-2020      | + / -         | 7-2019         | 7-2020 | + / -          | 7-2019        | 7-2020 | + / -          |
| <b>Single Family</b>  |                 |        |                |               |        |                |                    |             |               |                |        |                |               |        |                |
| 1 SF District 1       | 34              | 50     | <b>+47.1%</b>  | 17            | 21     | <b>+23.5%</b>  | \$1,958,000        | \$2,300,000 | <b>+17.5%</b> | 43             | 35     | <b>-18.6%</b>  | 2.2           | 3.2    | <b>+45.5%</b>  |
| 2 SF District 2       | 56              | 54     | <b>-3.6%</b>   | 39            | 28     | <b>-28.2%</b>  | \$1,407,000        | \$1,475,000 | <b>+4.8%</b>  | 19             | 14     | <b>-26.3%</b>  | 1.8           | 1.9    | <b>+5.6%</b>   |
| 3 SF District 3       | 26              | 37     | <b>+42.3%</b>  | 17            | 12     | <b>-29.4%</b>  | \$1,305,000        | \$1,155,250 | <b>-11.5%</b> | 20             | 27     | <b>+35.0%</b>  | 2.2           | 3.6    | <b>+63.6%</b>  |
| 4 SF District 4       | 38              | 54     | <b>+42.1%</b>  | 29            | 31     | <b>+6.9%</b>   | \$1,750,000        | \$1,560,000 | <b>-10.9%</b> | 21             | 21     | <b>0.0%</b>    | 1.4           | 2.5    | <b>+78.6%</b>  |
| 5 SF District 5       | 68              | 100    | <b>+47.1%</b>  | 43            | 45     | <b>+4.7%</b>   | \$2,315,000        | \$2,395,000 | <b>+3.5%</b>  | 21             | 23     | <b>+9.5%</b>   | 2.4           | 3.9    | <b>+62.5%</b>  |
| 6 SF District 6       | 19              | 19     | <b>0.0%</b>    | 3             | 5      | <b>+66.7%</b>  | \$2,275,000        | \$2,600,000 | <b>+14.3%</b> | 31             | 29     | <b>-6.5%</b>   | 4.9           | 5.8    | <b>+18.4%</b>  |
| 7 SF District 7       | 47              | 51     | <b>+8.5%</b>   | 2             | 11     | <b>+450.0%</b> | \$7,535,000        | \$4,267,500 | <b>-43.4%</b> | 33             | 66     | <b>+100.0%</b> | 5.9           | 6.8    | <b>+15.3%</b>  |
| 8 SF District 8       | 22              | 25     | <b>+13.6%</b>  | 1             | 2      | <b>+100.0%</b> | \$3,600,000        | \$4,212,500 | <b>+17.0%</b> | 21             | 30     | <b>+42.9%</b>  | 10.1          | 12.5   | <b>+23.8%</b>  |
| 9 SF District 9       | 59              | 74     | <b>+25.4%</b>  | 24            | 25     | <b>+4.2%</b>   | \$1,700,000        | \$1,725,000 | <b>+1.5%</b>  | 19             | 15     | <b>-21.1%</b>  | 3.1           | 4.2    | <b>+35.5%</b>  |
| 10 SF District 10     | 97              | 100    | <b>+3.1%</b>   | 38            | 31     | <b>-18.4%</b>  | \$1,022,500        | \$1,200,000 | <b>+17.4%</b> | 23             | 34     | <b>+47.8%</b>  | 2.6           | 3.3    | <b>+26.9%</b>  |
| <b>Condo/TIC/Coop</b> |                 |        |                |               |        |                |                    |             |               |                |        |                |               |        |                |
| 1 SF District 1       | 30              | 35     | <b>+16.7%</b>  | 15            | 19     | <b>+26.7%</b>  | \$1,410,000        | \$1,275,000 | <b>-9.6%</b>  | 21             | 38     | <b>+81.0%</b>  | 2.2           | 3.1    | <b>+40.9%</b>  |
| 2 SF District 2       | 15              | 20     | <b>+33.3%</b>  | 3             | 6      | <b>+100.0%</b> | \$1,250,000        | \$1,357,500 | <b>+8.6%</b>  | 28             | 30     | <b>+7.1%</b>   | 4.1           | 4.5    | <b>+9.8%</b>   |
| 3 SF District 3       | 7               | 15     | <b>+114.3%</b> | 2             | 2      | <b>0.0%</b>    | \$822,500          | \$972,500   | <b>+18.2%</b> | 104            | 19     | <b>-81.7%</b>  | 2.3           | 5.2    | <b>+126.1%</b> |
| 4 SF District 4       | 10              | 18     | <b>+80.0%</b>  | 4             | 5      | <b>+25.0%</b>  | \$657,000          | \$675,000   | <b>+2.7%</b>  | 76             | 13     | <b>-82.9%</b>  | 1.9           | 3.4    | <b>+78.9%</b>  |
| 5 SF District 5       | 85              | 155    | <b>+82.4%</b>  | 38            | 47     | <b>+23.7%</b>  | \$1,502,500        | \$1,475,000 | <b>-1.8%</b>  | 18             | 31     | <b>+72.2%</b>  | 2.5           | 4.7    | <b>+88.0%</b>  |
| 6 SF District 6       | 53              | 92     | <b>+73.6%</b>  | 24            | 22     | <b>-8.3%</b>   | \$1,287,500        | \$1,185,000 | <b>-8.0%</b>  | 47             | 33     | <b>-29.8%</b>  | 2.5           | 5.0    | <b>+100.0%</b> |
| 7 SF District 7       | 62              | 127    | <b>+104.8%</b> | 22            | 31     | <b>+40.9%</b>  | \$1,455,000        | \$1,700,000 | <b>+16.8%</b> | 24             | 30     | <b>+25.0%</b>  | 2.5           | 5.5    | <b>+120.0%</b> |
| 8 SF District 8       | 155             | 246    | <b>+58.7%</b>  | 48            | 38     | <b>-20.8%</b>  | \$942,500          | \$1,217,500 | <b>+29.2%</b> | 46             | 52     | <b>+13.0%</b>  | 3.8           | 8.0    | <b>+110.5%</b> |
| 9 SF District 9       | 288             | 544    | <b>+88.9%</b>  | 76            | 81     | <b>+6.6%</b>   | \$1,252,500        | \$1,120,000 | <b>-10.6%</b> | 29             | 41     | <b>+41.4%</b>  | 3.4           | 8.0    | <b>+135.3%</b> |
| 10 SF District 10     | 29              | 48     | <b>+65.5%</b>  | 12            | 5      | <b>-58.3%</b>  | \$842,500          | \$973,000   | <b>+15.5%</b> | 31             | 47     | <b>+51.6%</b>  | 4.6           | 11.8   | <b>+156.5%</b> |