SAN DIEGO COUNTY MONTHLY SOLD REPORT

SEPTEMBER 2026

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ABOUT THIS REPORT

This report delivers a clear, data-driven look at how homes actually sold during the previous month.

We analyze closed sales to uncover pricing behavior, buyer activity, and transaction outcomes, giving you real insight into how the market is performing.

BUILT FROM REAL CLOSED SALES, NOT ASSUMPTIONS.

Our focus is on what actually happens in the market so that you can make smarter decisions with confidence.

WHAT THIS REPORT COVERS

CASH BUYERS

Who is driving demand without financing?

PRICING PERFORMANCE

List price changes and how homes sold compared to original and final asking prices.

OFF-MARKET ACTIVITY

Homes removed from the market without a sale (delistings).

WHY IT MATTERS

Understanding how homes are actually selling provides a clear view of real market conditions, including who is buying, how homes are priced, and how transactions are closing.

This report uses finalized closed sales data and is published the following month to ensure accuracy.



Cash Buyers

% of Recorded Closings

SEPTEMBER 2026

SAN DIEGO COUNTY

SEPTEMBER 2026 SOLD REPORT

HOW MANY HOMES WERE PURCHASED WITH CASH

Based on percentage of closed sales in September 2026



23%
CASH BUYERS

Cash purchases accounted for 23% of all closed sales in September. It was 22% in August.

1% increase from August

77%
FINANCED BUYERS

The majority of buyers continue to rely on financing. It was at 78% in August.

1% decrease from August



TAKEAWAY

Cash buyer activity strengthened this month, gaining market share while financed buyers continued to dominate overall purchases.

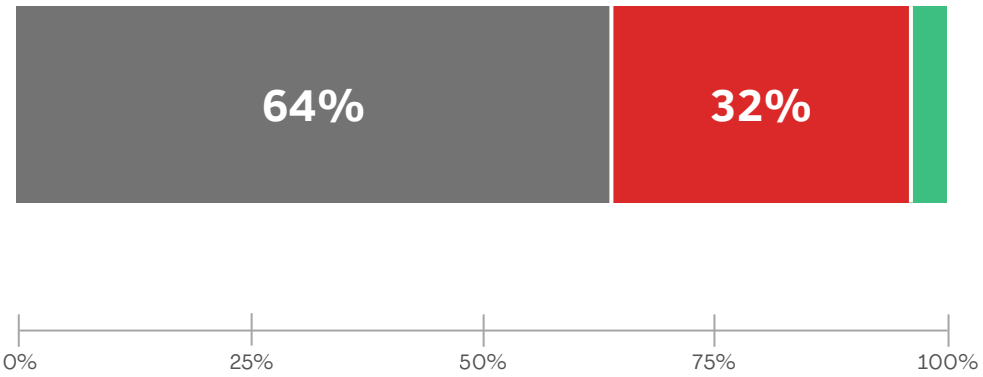
List Price Changes

% of Recorded Closings

SEPTEMBER 2026

HOW SELLERS ADJUSTED THEIR PRICES

Based on percentage of closed sales in September 2026



KEY INSIGHT

32%

HOMES REDUCED THEIR PRICE

Up 2% from August 2026

32%
DECREASED LIST PRICE

32% of all closed sales in September decreased the list price. It was at **30%** in August.

2% increase from August

64%
NO CHANGE

Roughly **64%** of all closed sales in September left the list price unchanged. It was **66%** in August.

2% decrease from August

4%
INCREASED LIST PRICE

4% of all sales in September increased the list price. It was at **4%** in August.

Unchanged from August

TAKEAWAY

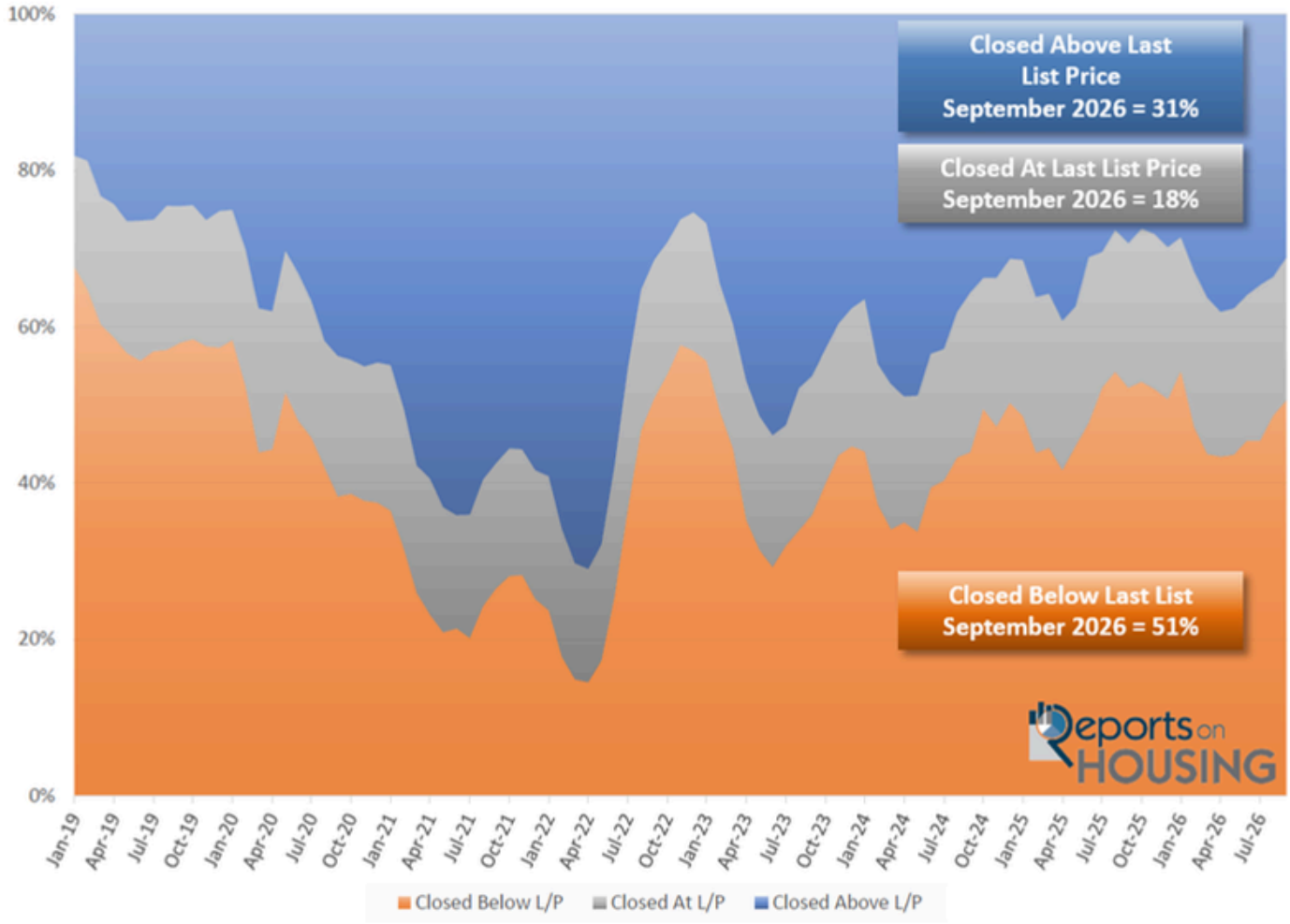
More sellers are adjusting prices to attract buyers in an increasingly competitive market.

Sold Breakdown

% of Recorded Closings

SEPTEMBER 2026

SAN DIEGO COUNTY
CLOSED VS. LAST LIST PRICE BREAKDOWN (% OF CLOSINGS)



OVERVIEW

In housing, September is often seen as a month when housing doesn't change much. Supply and demand typically fall at the same pace, leaving the market speed, the Expected Market Time, mostly unchanged. However, the market has absorbed a shock, with rates climbing at their fastest one-month pace since 2022 and reaching their highest level since 2024. Supply is stalling, demand is falling, and market times are slowing fast. This is also reflected in the closed sales data: San Diego County was down 5% vs. last month and 7% vs. last September. From here, unless rates change, the market will remain cooler year over year.

SEPTEMBER UPDATE

As the market slows, pricing will likely deteriorate. From September's closed sales data, **60% closed below** the **original** asking price, up 2% from August, while **51% closed below** the **final** asking price, also up 2%. As the calendar year comes to a close, fewer homeowners are finding success, but that doesn't mean all homeowners won't: 29% closed above the original asking price, and 31% closed above the final asking price. The best way to set your property up for success is to list it at its **Fair Market Value** and set **proper expectations** for today's sluggish housing market.

Cumulative Sold Report

% of Recorded Closings

SEPTEMBER 2026

SAN DIEGO COUNTY

SEPTEMBER 2026 SOLD REPORT

SEPTEMBER SNAPSHOT

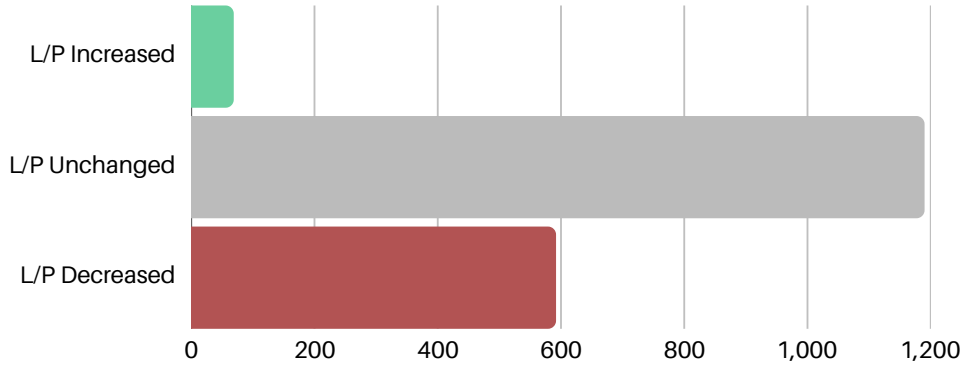
1,852
SOLD
Number of Closed Sales

22.8%
CASH
Percentage of Cash Buyers

$900,000
MEDIAN SALES PRICE
Median Price of Closed Sales

99.8%
SALE TO LIST PRICE RATIO
Median Sales-to-List Price Ratio

List Price Breakdown

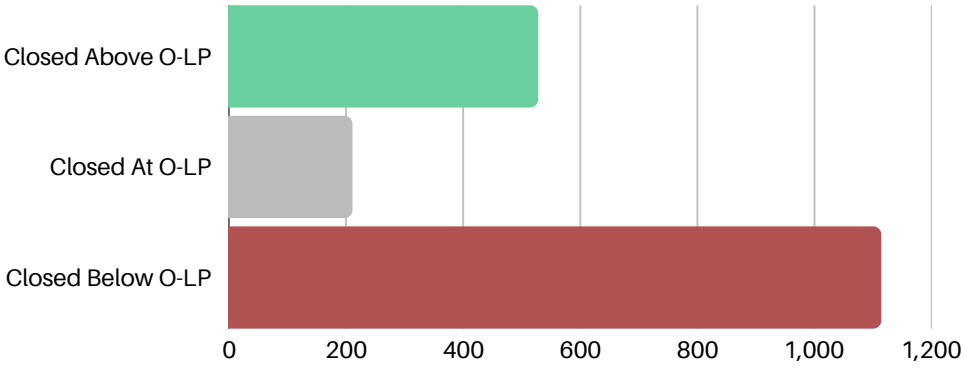


List Price Increased **4%**

List Price Unchanged **64%**

List Price Decreased **32%**

Closed Vs. Original List Price Breakdown



Closed Above Original LP **29%**

Closed At Original LP **11%**

Closed Below Original LP **60%**

Sold Vs. Original List Price Analysis

% of Recorded Closings

SEPTEMBER 2026

SAN DIEGO COUNTY

SEPTEMBER 2026 SOLD REPORT

HOW HOMES SOLD COMPARED TO THE ORIGINAL LIST PRICE

Based on percentage of closed sales in September 2026



29%

ABOVE ORIGINAL PRICE

↓ **2% decrease** from August

11%

AT ORIGINAL PRICE

→ **Unchanged** from August

60%

BELOW ORIGINAL PRICE

↑ **2% increase** from August

TAKEAWAY

This is a key data point for **sellers** because **first impressions matter**. An effective pricing strategy from the start can help attract buyers and reduce the need for future price adjustments.

Sold Vs. Last List Price Analysis

% of Recorded Closings

SEPTEMBER 2026

SAN DIEGO COUNTY

SEPTEMBER 2026 SOLD REPORT

HOW HOMES SOLD COMPARED TO THE FINAL LIST PRICE

Based on percentage of closed sales in September 2026



31%

ABOVE LAST PRICE

2% decrease from August

18%

AT LAST PRICE

Unchanged from August

51%

BELOW LAST PRICE

2% increase from August

TAKEAWAY

This is a key data point for **buyers**, revealing how frequently homes sell **at**, **above**, or **below** the final asking price. Understanding this trend helps buyers gauge negotiating leverage and overall market conditions.

Off Market

% of Recorded Closings

SEPTEMBER 2026

SAN DIEGO COUNTY

SEPTEMBER 2026 SOLD REPORT

HOW MANY HOMES WERE PULLED FROM THE MARKET?

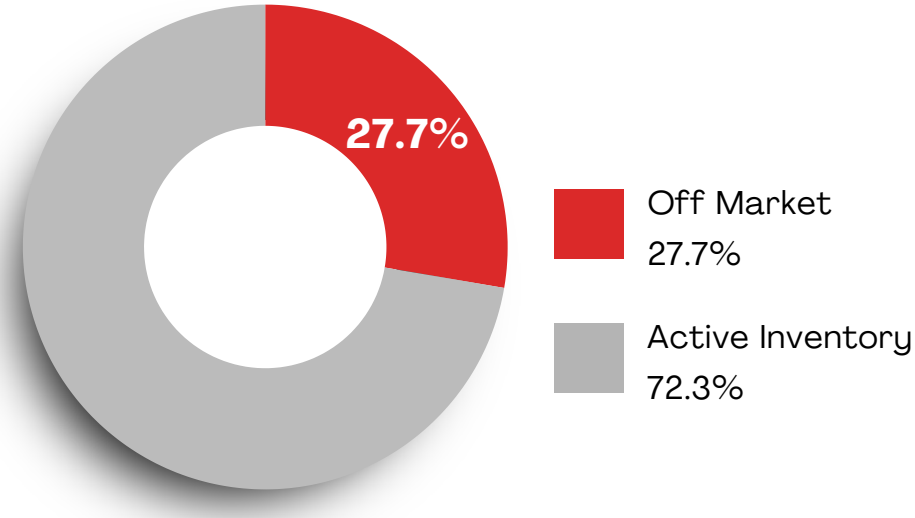
Based on a percentage of active inventory

27.7%

of homes were pulled from the market

Up 5%

from August



1,641
HOMES
were pulled from the market in September

5%
INCREASE
compared to August

27.7%
OF LISTINGS
were unsuccessful in selling

Homes pulled from the market increased this month, reflecting continued challenges for sellers navigating current housing conditions. More homeowners may be withdrawing their listings rather than making further price adjustments.

TAKEAWAY

Rising delistings may reflect growing seller frustration as expectations clash with market realities. This trend offers valuable insight into pricing challenges and seller confidence.

SAN DIEGO COUNTY CITY SOLD BREAKDOWN

Sept. 2026

SAN DIEGO COUNTY CITIES	UNITS SOLD SEPT 2026	LIST PRICE INCREASE	LIST PRICE NO CHANGE	LIST PRICE DECREASE	AVG. DROP IN LIST PRICE (%)	AVG. DROP IN LIST PRICE ($)	CLOSED ABOVE ORIGINAL L/P (%)	CLOSED AT ORIGINAL L/P (%)	CLOSED BELOW ORIGINAL L/P (%)	(%) OF HOMES SOLD LESS THAN 30 DAYS	UNITS SOLD SEPT 2025
Alpine	17	6%	35%	59%	8%	$100k	18%	0%	82%	29%	13
Bonita	9	0%	22%	78%	4%	$34k	22%	0%	78%	33%	9
Bonsall	7	0%	57%	43%	6%	$124k	14%	43%	43%	71%	5
Borrego Springs	1	0%	100%	0%	N/A	N/A	0%	0%	100%	0%	6
Campo	1	0%	100%	0%	N/A	N/A	0%	0%	100%	100%	6
Cardiff by the Sea	5	0%	100%	0%	N/A	N/A	40%	20%	40%	100%	4
Carlsbad	89	1%	69%	30%	6%	$100k	26%	6%	68%	56%	89
Carmel Valley	32	0%	72%	28%	5%	$93k	25%	3%	72%	59%	34
Chula Vista	108	11%	67%	22%	4%	$29k	52%	8%	40%	64%	136
City Heights	11	0%	50%	50%	7%	$60k	0%	0%	100%	0%	25
Clairemont	31	3%	74%	23%	5%	$39k	29%	13%	58%	68%	31
Coronado	22	0%	64%	36%	5%	$174k	5%	9%	86%	50%	29
Del Cerro	16	6%	81%	13%	4%	$35k	50%	13%	38%	69%	19
Del Mar	9	0%	67%	33%	2%	$183k	0%	11%	89%	44%	8
Downtown	48	0%	62%	38%	5%	$46k	6%	9%	85%	36%	46
El Cajon	82	5%	65%	30%	6%	$48k	32%	14%	54%	68%	74
Encanto	19	11%	47%	42%	5%	$35k	63%	0%	37%	63%	22
Encinitas	40	3%	77%	21%	6%	$132k	23%	10%	67%	64%	51
Escondido	115	2%	61%	37%	6%	$65k	23%	10%	68%	50%	136
Fallbrook	51	0%	63%	37%	7%	$103k	25%	14%	61%	33%	56
Imperial Beach	12	0%	64%	36%	7%	$71k	27%	9%	64%	45%	18
Jamul	3	0%	67%	33%	14%	$105k	33%	0%	67%	33%	7
Julian	2	0%	50%	50%	1%	$3k	50%	0%	50%	0%	7
La Jolla	37	0%	86%	14%	6%	$454k	16%	14%	70%	73%	51
La Mesa	59	2%	64%	34%	6%	$65k	32%	12%	56%	64%	37
Lakeside	22	9%	64%	27%	3%	$18k	41%	9%	50%	68%	29
Lemon Grove	15	0%	53%	47%	7%	$60k	13%	20%	67%	53%	13
Linda Vista	23	0%	78%	22%	11%	$126k	22%	13%	65%	83%	25
Mira Mesa	26	4%	69%	27%	6%	$48k	27%	4%	69%	58%	24
Mission Hills/Hillcrest	28	0%	75%	25%	4%	$51k	18%	14%	68%	64%	25
Mission Valley	25	0%	68%	32%	3%	$36k	8%	8%	84%	52%	21
National City	5	20%	60%	20%	7%	$56k	80%	0%	20%	60%	11
Normal Heights	16	0%	69%	31%	6%	$69k	31%	6%	63%	81%	18
North Park	27	12%	58%	31%	11%	$135k	27%	12%	62%	69%	21
Ocean Beach	9	0%	100%	0%	N/A	N/A	33%	33%	33%	78%	20
Oceanside	143	5%	66%	29%	5%	$43k	30%	17%	53%	58%	130
Old Town SD	18	0%	50%	50%	7%	$66k	28%	6%	67%	39%	21
Otay Mesa	32	9%	66%	25%	3%	$27k	53%	3%	44%	63%	44
Pacific/Mission Beach	27	4%	70%	26%	6%	$53k	30%	11%	59%	74%	23
Paradise Hills	12	0%	83%	17%	3%	$25k	50%	0%	50%	67%	14
Pauma Valley	3	0%	100%	0%	N/A	N/A	0%	67%	33%	67%	0
Pine Valley	3	33%	67%	0%	N/A	N/A	67%	33%	0%	67%	1
Point Loma	17	0%	71%	29%	5%	$78k	24%	18%	59%	71%	18
Poway	23	4%	74%	22%	6%	$98k	43%	9%	48%	74%	40
Ramona	21	5%	62%	33%	6%	$59k	24%	24%	52%	57%	43
Rancho Bernardo	46	4%	74%	22%	4%	$47k	15%	22%	63%	63%	55
Rancho Penasquitos	30	13%	50%	37%	6%	$93k	33%	13%	53%	57%	23
Rancho Santa Fe	22	0%	68%	32%	10%	$744k	14%	23%	64%	41%	21
San Carlos	33	3%	52%	45%	6%	$60k	27%	9%	64%	55%	16
San Diego	677	3%	65%	32%	6%	$60k	27%	10%	63%	60%	716
San Marcos	65	5%	51%	45%	6%	$57k	26%	14%	60%	46%	78
San Ysidro	1	0%	0%	100%	6%	$40k	0%	0%	100%	0%	3
Santaluz	27	4%	74%	22%	4%	$47k	15%	22%	63%	63%	25
Santee	47	9%	60%	32%	4%	$31k	49%	9%	43%	85%	33
Scripps Ranch	20	0%	55%	45%	5%	$74k	10%	10%	80%	50%	20
Solana Beach	12	0%	75%	25%	9%	$257k	8%	0%	92%	50%	21

SAN DIEGO COUNTY CITY SOLD BREAKDOWN

Sept. 2026

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Spring Valley	35	9%	66%	26%	6%	$59k	51%	14%	34%	74%	30
Tierrasanta	10	0%	60%	40%	4%	$39k	10%	20%	70%	70%	16
University City	25	0%	60%	40%	4%	$41k	8%	12%	80%	48%	20
Valley Center	22	5%	50%	45%	7%	$79k	27%	18%	55%	50%	14
Vista	46	0%	57%	43%	7%	$70k	22%	15%	63%	46%	58
All of S.D.	**1,852**	**4%**	**64%**	**32%**	**6%**	**$77k**	**28%**	**11%**	**60%**	**58%**	**2,002**
$0-$500k	186	2%	58%	39%	8%	$33k	15%	15%	70%	42%	197
$500k-$750k	419	5%	59%	36%	5%	$37k	30%	12%	58%	57%	468
$750k-$1m	474	6%	62%	32%	5%	$46k	35%	11%	55%	61%	547
$1m-$1.25m	250	3%	65%	32%	6%	$76k	26%	13%	60%	59%	267
$1.25m-$1.5m	184	3%	66%	32%	7%	$112k	32%	5%	63%	62%	155
$1.5m-$2m	148	3%	74%	22%	5%	$99k	29%	11%	59%	66%	161
$2m-$4m	148	1%	80%	19%	7%	$201k	27%	10%	63%	66%	163
$4m-$6m	24	0%	75%	25%	7%	$380k	8%	21%	71%	50%	31
$6m+	19	0%	58%	42%	9%	$791k	5%	16%	79%	53%	13

SAN DIEGO COUNTY
SOLD RANGE BREAKDOWN

SAN DIEGO COUNTY SOLD RANGE BREAKDOWN

Sept. 2026

SAN DIEGO COUNTY ATTACHED HOMES	UNITS SOLD SEPT 2026	LIST PRICE INCREASE	LIST PRICE NO CHANGE	LIST PRICE DECREASE	AVG. DROP IN LIST PRICE (%)	AVG. DROP IN LIST PRICE ($)	CLOSED ABOVE ORIGINAL L/P (%)	CLOSED AT ORIGINAL L/P (%)	CLOSED BELOW ORIGINAL L/P (%)	(%) OF HOMES SOLD LESS THAN 30 DAYS	UNITS SOLD SEPT 2025
All of S.D.	409	4%	60%	36%	6%	$41k	25%	14%	61%	50%	694
S.D. $0-$500k	71	0%	55%	45%	7%	$30k	20%	15%	65%	39%	158
S.D. $500k-$750k	173	6%	54%	40%	6%	$38k	28%	12%	59%	52%	279
S.D. $750k-$1m	85	6%	60%	35%	4%	$42k	20%	15%	64%	48%	125
S.D. $1m-$2m	68	3%	78%	19%	5%	$66k	31%	10%	59%	63%	100
S.D. $2m+	12	0%	83%	17%	4%	$110k	8%	33%	58%	42%	32

SAN DIEGO COUNTY DETACHED HOMES	UNITS SOLD SEPT 2026	LIST PRICE INCREASE	LIST PRICE NO CHANGE	LIST PRICE DECREASE	AVG. DROP IN LIST PRICE (%)	AVG. DROP IN LIST PRICE ($)	CLOSED ABOVE ORIGINAL L/P (%)	CLOSED AT ORIGINAL L/P (%)	CLOSED BELOW ORIGINAL L/P (%)	(%) OF HOMES SOLD LESS THAN 30 DAYS	UNITS SOLD SEPT 2025
All of S.D.	1,443	4%	65%	31%	6%	$88k	29%	11%	60%	61%	1,308
S.D. $0-$500k	113	4%	61%	36%	9%	$36k	12%	14%	74%	44%	38
S.D. $500-$750k	246	4%	62%	34%	5%	$37k	31%	12%	57%	60%	195
S.D. $750k-$1m	391	6%	63%	32%	5%	$47k	38%	10%	53%	63%	424
S.D. $1m-$1.25m	221	3%	65%	33%	6%	$80k	25%	14%	61%	59%	218
S.D. $1.25m-$1.5m	161	3%	63%	34%	7%	$113k	33%	4%	64%	63%	126
S.D. $1.5m-$2m	133	4%	72%	24%	5%	$98k	30%	11%	59%	64%	133
S.D. $2m-$4m	136	1%	80%	19%	7%	$208k	29%	8%	63%	68%	132
S.D. $4m-6m	23	0%	74%	26%	7%	$380k	9%	17%	74%	48%	30
S.D. $6m+	19	0%	58%	42%	9%	$791k	5%	16%	79%	53%	12

SAN DIEGO COUNTY ALL HOMES	UNITS SOLD SEPT 2026	LIST PRICE INCREASE	LIST PRICE NO CHANGE	LIST PRICE DECREASE	AVG. DROP IN LIST PRICE (%)	AVG. DROP IN LIST PRICE ($)	CLOSED ABOVE ORIGINAL L/P (%)	CLOSED AT ORIGINAL L/P (%)	CLOSED BELOW ORIGINAL L/P (%)	(%) OF HOMES SOLD LESS THAN 30 DAYS	UNITS SOLD SEPT 2025
All of S.D.	1,852	4%	64%	32%	6%	$77k	28%	11%	60%	58%	2,002
S.D. $0-$500k	186	2%	58%	39%	8%	$33k	15%	15%	70%	42%	197
S.D. $500-$750k	419	5%	59%	36%	5%	$37k	30%	12%	58%	57%	468
S.D. $750k-$1m	474	6%	62%	32%	5%	$46k	35%	11%	55%	61%	547
S.D. $1m-$1.25m	250	3%	65%	32%	6%	$76k	26%	13%	60%	59%	267
S.D. $1.25m-$1.5m	184	3%	66%	32%	7%	$112k	32%	5%	63%	62%	155
S.D. $1.5m-$2m	148	3%	74%	22%	5%	$99k	29%	11%	59%	66%	161
S.D. $2m-$4m	148	1%	80%	19%	7%	$201k	27%	10%	63%	66%	163
S.D. $4m-6m	24	0%	75%	25%	7%	$380k	8%	21%	71%	50%	31
S.D. $6m+	19	0%	58%	42%	9%	$791k	5%	16%	79%	53%	13

*Data tabulated from CRMLS. This data may not reflect all real estate activity in the market. Due to Range Price listings, "All Homes," "Attached" and "Detached" totals do not add up and are slightly off.