

Single Family Residence - Absorption Rate

Sarasota, Manatee & Charlotte Counties | Stellar MLS | July 2026 vs June 2026 | Absorption on trailing 90-day sales pace

Month	County	Active Listings	New Listings	Pending (current)	Sold (month)	Avg Sold (3-mo)	Months of Inventory	Median Orig List	Median Sold Price	% Reduced from Orig	Days to Sell (DOM)	Expired	Close-to-Orig % (source)
July 2026	Sarasota	3391	942	948	814	894.3	3.8	\$429,000	\$439,500	5.5%	42	136	94.5%
June 2026	Sarasota	3726	950		931	927.3	4.0	\$449,000	\$432,250	5.5%	41	124	94.5%
July 2026	Manatee	3153	939	1024	758	876.0	3.6	\$450,000	\$444,999	4.7%	45	115	95.3%
June 2026	Manatee	3304	1005		990	893.3	3.7	\$475,000	\$458,150	4.2%	40	99	95.8%
July 2026	Charlotte	2543	599	584	553	562.7	4.5	\$350,000	\$335,000	6.2%	59	115	93.8%
June 2026	Charlotte	2765	616		555	569.3	4.9	\$339,400	\$345,000	6.3%	63	126	93.7%
July 2026	TOTAL	9087	2480	2556	2125	2333.0	3.9	n/a	n/a	n/a	n/a	366	
June 2026	TOTAL	9795	2571		2476	2389.9	4.1	n/a	n/a	n/a	n/a	349	

NEED TO KNOW

- Single family stays a seller's market on a trailing 90-day pace: July 2026 months of inventory is about 3.8 in Sarasota, 3.6 in Manatee, and 4.5 in Charlotte.
- Inventory is a touch tighter than a raw one-month read shows, because July closings dipped and the 3-month average smooths that out.
- Sellers gave back about 4.7% to 6.2% off original list, steady across all three counties.

DEFINITIONS

Active Listings	Homes actively for sale at the measurement point.
New Listings	Listings that came on the market during the month.
Pending (current)	Homes under contract right now (live snapshot, not a monthly figure).
Sold (month)	Closed sales recorded during that single month.
Avg Sold (3-mo)	Average monthly closed sales over the trailing 3 months (90-day sales pace). For the target month this is the average of May, June and July.
Months of Inventory	Active Listings divided by the Avg Sold (3-mo). This is the trailing 90-day absorption method. Lower means a tighter, more seller-favored market.
Median Orig List	Median of the original list prices for the month's closed sales.
Median Sold Price	Median closing price for the month.
% Reduced from Orig	100% minus the Close Price to Original Price ratio. It is NOT the gap between the two median columns.
Days to Sell (DOM)	Median days from list to contract for the month's sales.
Expired	Listings that expired without selling during the month.
Close-to-Orig % (source)	Stellar's Close Price to Original Price ratio, the input for % Reduced from Orig.

Source: Stellar MLS (Matrix Stats). Sold counts pulled over Apr-Jul 2026 grouped by Month, measure Sales, Number of. Absorption uses the trailing 90-day (3-month) average sales pace. Prepared for The AGNT Group / KW Coastal Living III. See Data Log tab.

Condominium & Townhouse - Absorption Rate

Sarasota, Manatee & Charlotte Counties | Stellar MLS | July 2026 vs June 2026 | Absorption on trailing 90-day sales pace

Month	County	Active Listings	New Listings	Pending (current)	Sold (month)	Avg Sold (3-mo)	Months of Inventory	Median Orig List	Median Sold Price	% Reduced from Orig	Days to Sell (DOM)	Expired	Close-to-Orig % (source)
July 2026	Sarasota	2452	351	350	314	339.7	7.2	\$234,000	\$279,750	8.9%	75	117	91.1%
June 2026	Sarasota	2666	401		346	365.0	7.3	\$275,000	\$322,000	7.7%	69	104	92.3%
July 2026	Manatee	1644	311	211	252	276.0	6.0	\$226,944	\$240,000	6.0%	65	61	94.0%
June 2026	Manatee	1749	335		279	288.3	6.1	\$234,900	\$235,427	7.9%	74	65	92.1%
July 2026	Charlotte	818	114	61	81	104.0	7.9	\$210,500	\$175,000	10.1%	105	61	89.9%
June 2026	Charlotte	871	123		118	119.7	7.3	\$197,500	\$249,900	10.6%	77	42	89.4%
July 2026	TOTAL	4914	776	622	647	719.7	6.8	n/a	n/a	n/a	n/a	239	
June 2026	TOTAL	5286	859		743	773.0	6.8	n/a	n/a	n/a	n/a	211	

NEED TO KNOW

- Condos and townhomes favor buyers but less than a one-month view suggests: trailing 90-day months of inventory is about 7.2 in Sarasota, 6.0 in Manatee, and 7.9 in Charlotte.
- Charlotte looks far less overbuilt on the 3-month pace (about 7.9 months) than on July alone, where a slow sales month distorted the picture.
- Price cuts run deeper on attached homes, about 6.0% to 10.1% off original list, widest in Charlotte.

DEFINITIONS

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Close-to-Orig % (source)	Stellar's Close Price to Original Price ratio, the input for % Reduced from Orig.

Source: Stellar MLS (Matrix Stats). Sold counts pulled over Apr-Jul 2026 grouped by Month, measure Sales, Number of. Absorption uses the trailing 90-day (3-month) average sales pace. Prepared for The AGNT Group / KW Coastal Living III. See Data Log tab.

Single-Family Price-Point Detail

Sarasota & Manatee Counties | Stellar MLS | July 2026 | Price-band figures are a one-month snapshot

Absorption - Months of Inventory (1-month snapshot)

Price Band	Sarasota	Manatee
\$0-200k	5.0	3.0
\$200-400k	3.0	3.0
\$400-600k	4.0	4.0
\$600-800k	4.0	4.0
\$800k-1M	4.0	4.0
\$1-1.25M	3.0	6.0
\$1.25-1.5M	4.0	7.0

CDOM Average (days on market)

Price Band	Sarasota	Manatee
\$0-200k	75	63
\$200-400k	85	80
\$400-600k	88	87
\$600-800k	89	91
\$800k-1M	80	110
\$1-1.25M	73	66
\$1.25-1.5M	80	78

Close-to-Original Price Ratio

Price Band	Sarasota	Manatee
\$0-200k	98.5%	100.0%
\$200-400k	95.0%	94.5%
\$400-600k	93.5%	95.6%
\$600-800k	95.0%	95.4%
\$800k-1M	94.0%	94.2%
\$1-1.25M	90.7%	92.7%
\$1.25-1.5M	92.7%	94.8%

Closed Sales (sample size, month)

Price Band	Sarasota	Manatee
\$0-200k	143	115
\$200-400k	232	196
\$400-600k	194	217
\$600-800k	92	110
\$800k-1M	52	57
\$1-1.25M	35	22
\$1.25-1.5M	25	13

How to read: these price-band figures are a single-month (July) snapshot, so they are more volatile than the county headline, which uses the trailing 90-day pace. Bands under 25 sales are grey italic and directional only. Months of inventory below about 4 signals a tight, seller-favored band.

Data Log - Raw Figures & Method

Source: Stellar MLS (Matrix Stats). Sold counts pulled over Apr-Jul 2026, grouped by Month, measure Sales, Number of. Pulled 2026-08-01.

Method: Months of Inventory = Active Listings divided by the average monthly closed sales over the trailing 3 months (90-day pace).

Property Type	County	Month row	Active	Sold Apr	Sold May	Sold Jun	Sold Jul	Avg Sold (3-mo)	Months of Inventory
Single Family	Sarasota	July 2026	3391	913	938	931	814	894.3	3.79
Single Family	Sarasota	June 2026	3726	913	938	931	814	927.3	4.02
Single Family	Manatee	July 2026	3153	810	880	990	758	876	3.6
Single Family	Manatee	June 2026	3304	810	880	990	758	893.3	3.7
Single Family	Charlotte	July 2026	2543	573	580	555	553	562.7	4.52
Single Family	Charlotte	June 2026	2765	573	580	555	553	569.3	4.86
Condo & Townhome	Sarasota	July 2026	2452	390	359	346	314	339.7	7.22
Condo & Townhome	Sarasota	June 2026	2666	390	359	346	314	365	7.3
Condo & Townhome	Manatee	July 2026	1644	289	297	279	252	276	5.96
Condo & Townhome	Manatee	June 2026	1749	289	297	279	252	288.3	6.07
Condo & Townhome	Charlotte	July 2026	818	128	113	118	81	104	7.87
Condo & Townhome	Charlotte	June 2026	871	128	113	118	81	119.7	7.28

Note: 'Avg Sold (3-mo)' for the July row = mean of May, Jun, Jul. For the June row = mean of Apr, May, Jun. Active listings are the end-of-month snapshot for each row's month.