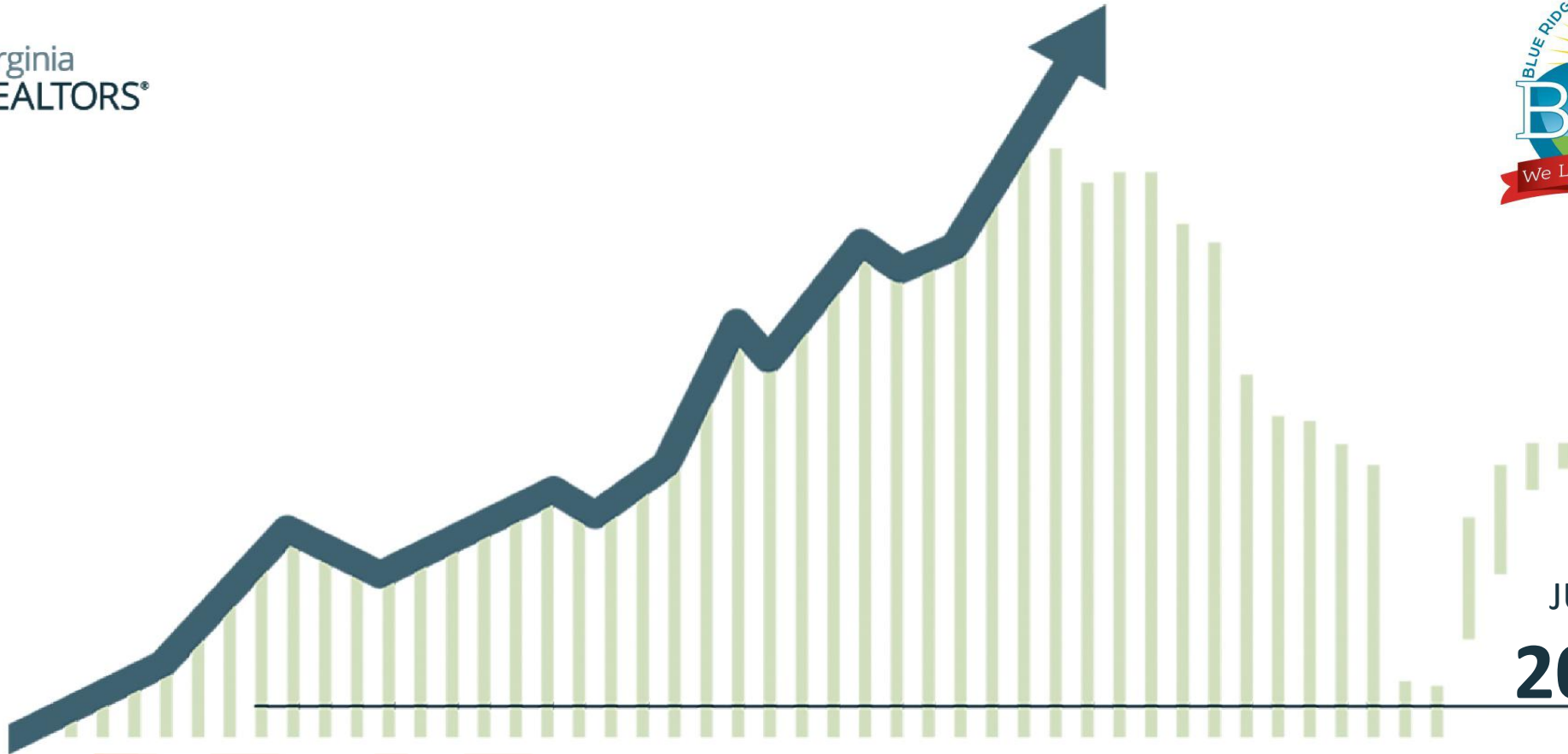
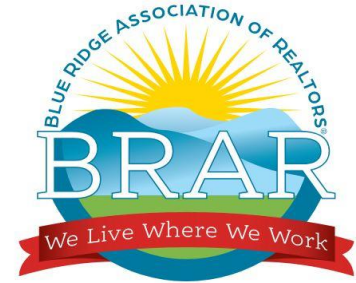




JUNE
2026

BRARBLUE RIDGE

MARKET INDICATORS REPORT

CUSTOM REPORT PREPARED BY
VIRGINIA REALTORS®

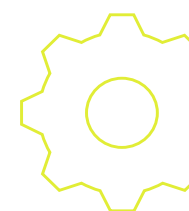
BRAR Market Indicators Report



Key Market Trends: June 2026

- › **Sales activity has dipped for two straight months in the BRAR region.** In June, there were 240 home sales across the region, down 15.2% or 43 fewer sales than a year ago. The year-over-year downward trend in the region was driven by Frederick County (-25.0%) and Warren County (-11.6%). Despite this trend, Clarke County still posts higher sales than last year, with 23 sales in June, seven more than the previous year (+43.8%).
- › **Most markets in the BRAR area reported fewer pending sales than last June.** The BRAR market saw 257 pending sales in June, which is 20 fewer than a year earlier, a 7.2% decrease. Winchester had 31 pending sales this month, down 13.9% or five fewer than a year ago. Clarke County (-30.4%) and Frederick County (-7.1%) also noted year-over-year declines in pending sales.
- › **The median sales price dipped throughout the BRAR footprint.** At \$425,000, BRAR's median sales price fell 5.6% from the prior year, a \$25,000 decline. Frederick County's median sales price was \$432,000 in June, down \$27,995 (-6.1%). Winchester experienced the largest drop in median sales price in the region, with homes selling 9.2% lower than last year, a decrease of \$37,510.
- › **New listings increased again compared to last year, maintaining elevated inventory levels throughout the region.** At the end of June, there were 656 active listings in the BRAR market, which is 127 more listings than last year, a 24.0% decline. With 78 active listings at the end of the month, Winchester recorded the most listings at months' end since 2019. Frederick County had 384 active listings at the end of June, 89 more than the previous year (+30.2%).

INTEREST RATE
TRACKER



BRAR Market Dashboard

YoY Chg	Jun-26	Indicator
▼ -15.2%	240	Sales
▼ -7.2%	257	Pending Sales
▲ 4.4%	405	New Listings
▼ -4.5%	\$429,900	Median List Price
▼ -5.6%	\$425,000	Median Sales Price
▼ -2.8%	\$216	Median Price Per Square Foot
▼ -19.9%	\$110.7	Sold Dollar Volume (in millions)
— 0.0%	100.0%	Median Sold/Ask Price Ratio
▼ -18.1%	32	Average Days on Market
▲ 24.0%	656	Active Listings
▲ 30.2%	3.0	Months of Supply

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Consumers Should Consult with a REALTOR®.

Buying or selling real estate, for a majority of consumers, is one of the most important decisions they will make. Choosing a real estate professional continues to be a vital part of this process.

Identify a Professional to Manage the Procedure.

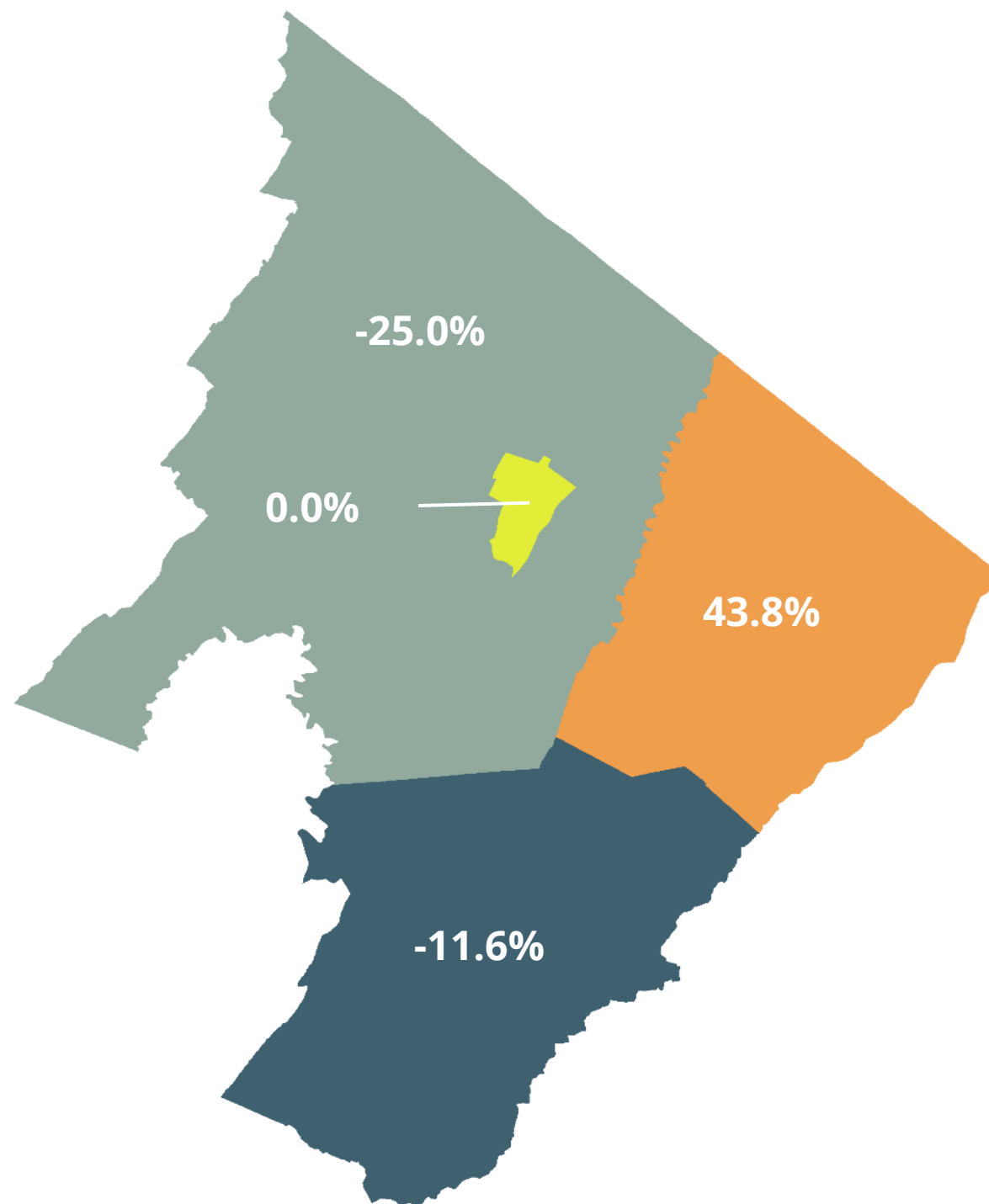
REALTORS® are well-informed about critical factors that affect your specific market area – such as changes in market conditions, consumer attitudes and interest rates.

Are You Ready to Buy or Sell Real Estate?

Contact an experienced REALTOR®.



Market Activity - BRAR Footprint



<i>Jurisdiction</i>	Total Sales		
	Jun-25	Jun-26	% Chg
Clarke County	16	23	43.8%
Frederick County	168	126	-25.0%
Warren County	69	61	-11.6%
Winchester	30	30	0.0%
BRAR	283	240	-15.2%

Total Market Overview



Key Metrics	2-year Trends		Jun-25	Jun-26	YoY Chg	2025 YTD	2026 YTD	YoY Chg
	Jun-24	Jun-26						
Sales			283	240	-15.2%	1,286	1,273	-1.0%
Pending Sales			277	257	-7.2%	1,461	1,442	-1.3%
New Listings			388	405	4.4%	2,072	2,304	11.2%
Median List Price			\$449,999	\$429,900	-4.5%	\$425,000	\$424,000	-0.2%
Median Sales Price			\$450,000	\$425,000	-5.6%	\$425,000	\$420,000	-1.2%
Median Price Per Square Foot			\$222	\$216	-2.8%	\$215	\$213	-1.0%
Sold Dollar Volume (in millions)			\$138.2	\$110.7	-19.9%	\$610.8	\$609.0	-0.3%
Median Sold/Ask Price Ratio			100.0%	100.0%	0.0%	100.0%	100.0%	0.0%
Average Days on Market			39	32	-18.1%	37	41	10.9%
Active Listings			529	656	24.0%	n/a	n/a	n/a
Months of Supply			2.3	3.0	30.2%	n/a	n/a	n/a

Source: Virginia REALTORS®, data accessed July 15, 2026

Single-Family Detached Market Overview



Key Metrics	2-year Trends			Jun-25	Jun-26	YoY Chg	2025 YTD	2026 YTD	YoY Chg
	Jun-24		Jun-26						
Sales				242	200	-17.4%	1,065	1,050	-1.4%
Pending Sales				240	225	-6.3%	1,226	1,197	-2.4%
New Listings				341	332	-2.6%	1,740	1,925	10.6%
Median List Price				\$479,990	\$459,495	-4.3%	\$450,000	\$450,000	0.0%
Median Sales Price				\$479,995	\$466,710	-2.8%	\$450,229	\$450,000	-0.1%
Median Price Per Square Foot				\$229	\$219	-4.4%	\$220	\$218	-0.8%
Sold Dollar Volume (in millions)				\$124.1	\$96.1	-22.6%	\$534.7	\$530.0	-0.9%
Median Sold/Ask Price Ratio				100.0%	100.0%	0.0%	100.0%	100.0%	0.0%
Average Days on Market				42	31	-26.2%	39	41	5.1%
Active Listings				449	554	23.4%	n/a	n/a	n/a
Months of Supply				2.3	3.0	32.2%	n/a	n/a	n/a

Source: Virginia REALTORS®, data accessed July 15, 2026

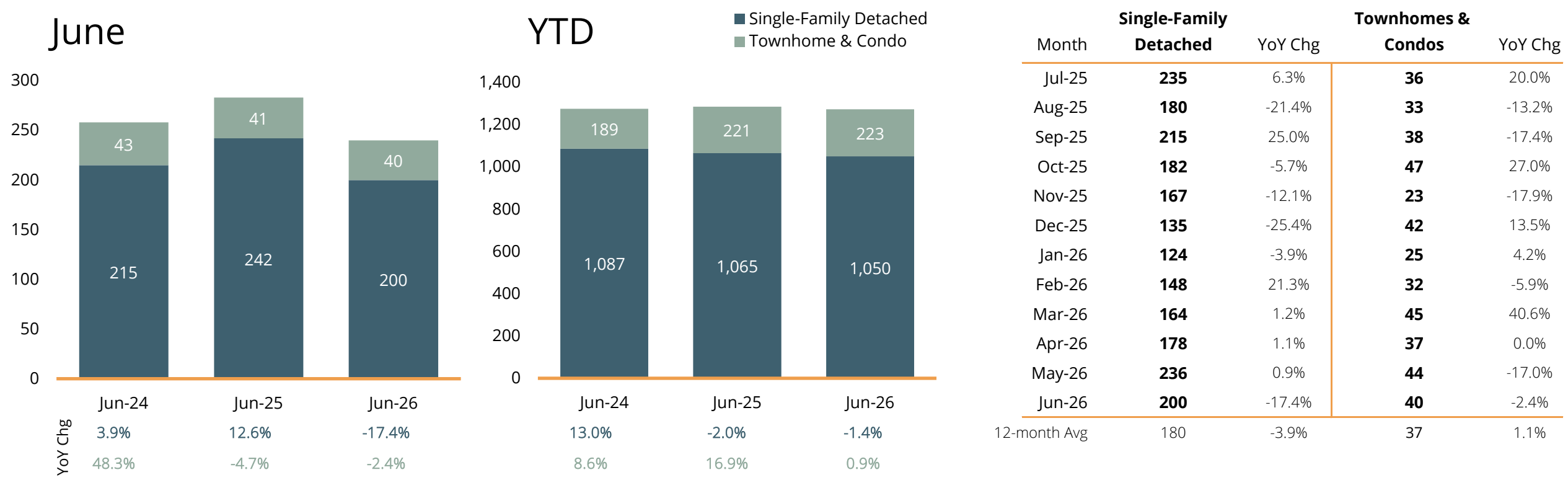
Townhome & Condo Market Overview



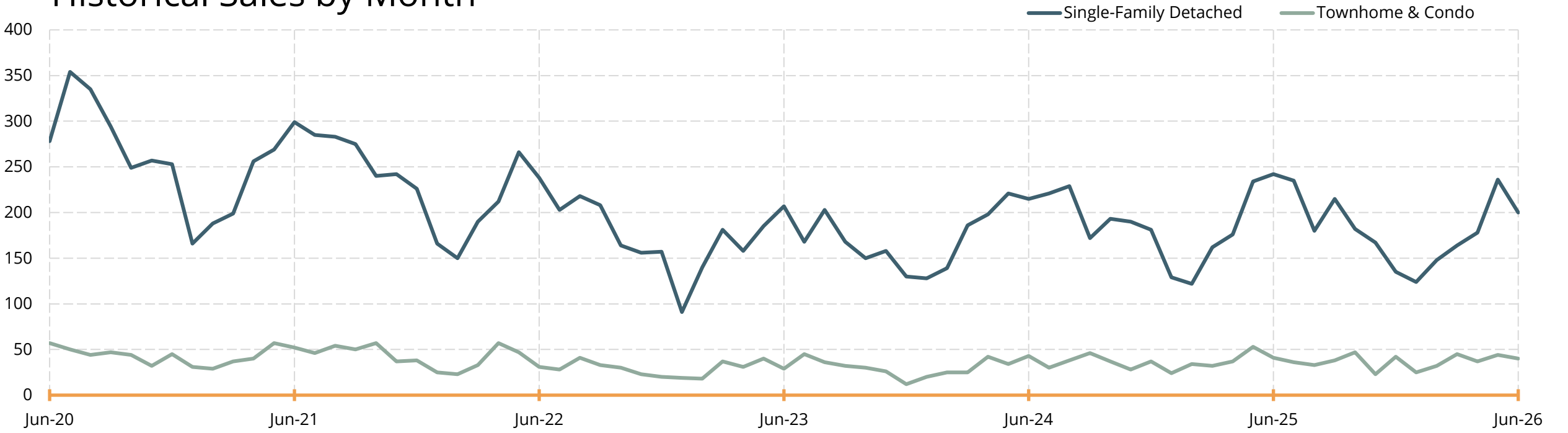
Key Metrics	2-year Trends			Jun-25	Jun-26	YoY Chg	2025 YTD	2026 YTD	YoY Chg
	Jun-24		Jun-26						
Sales				41	40	-2.4%	221	223	0.9%
Pending Sales				37	32	-13.5%	235	245	4.3%
New Listings				47	73	55.3%	332	379	14.2%
Median List Price				\$360,000	\$379,990	5.6%	\$350,343	\$372,105	6.2%
Median Sales Price				\$350,000	\$379,995	8.6%	\$350,000	\$369,990	5.7%
Median Price Per Square Foot				\$200	\$206	2.7%	\$204	\$205	0.5%
Sold Dollar Volume (in millions)				\$14.1	\$14.7	3.8%	\$76.0	\$78.9	3.8%
Median Sold/Ask Price Ratio				99.1%	100.0%	0.9%	100.0%	100.0%	0.0%
Average Days on Market				20	36	76.3%	30	43	46.9%
Active Listings				80	102	27.5%	n/a	n/a	n/a
Months of Supply				2.3	2.7	17.6%	n/a	n/a	n/a

Source: Virginia REALTORS®, data accessed July 15, 2026

Sales

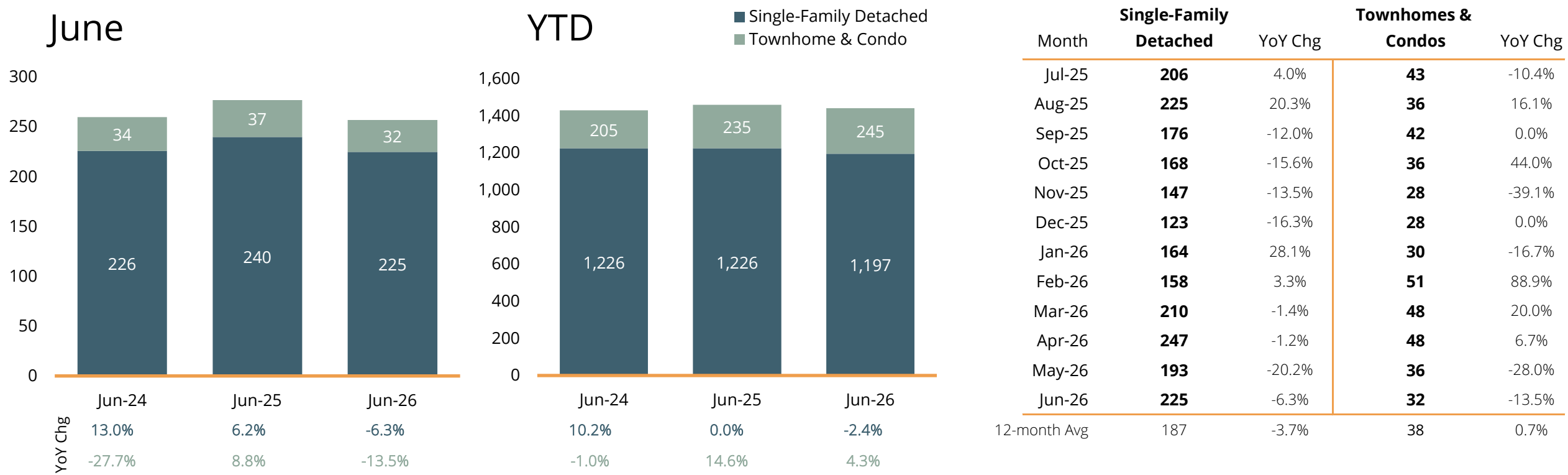


Historical Sales by Month

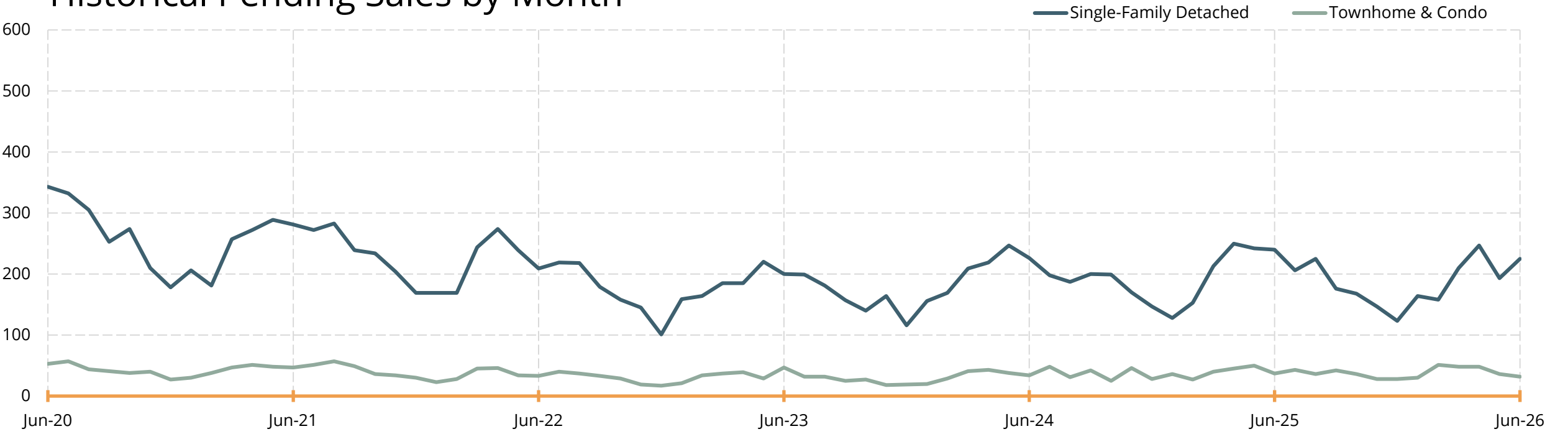


Source: Virginia REALTORS®, data accessed July 15, 2026

Pending Sales

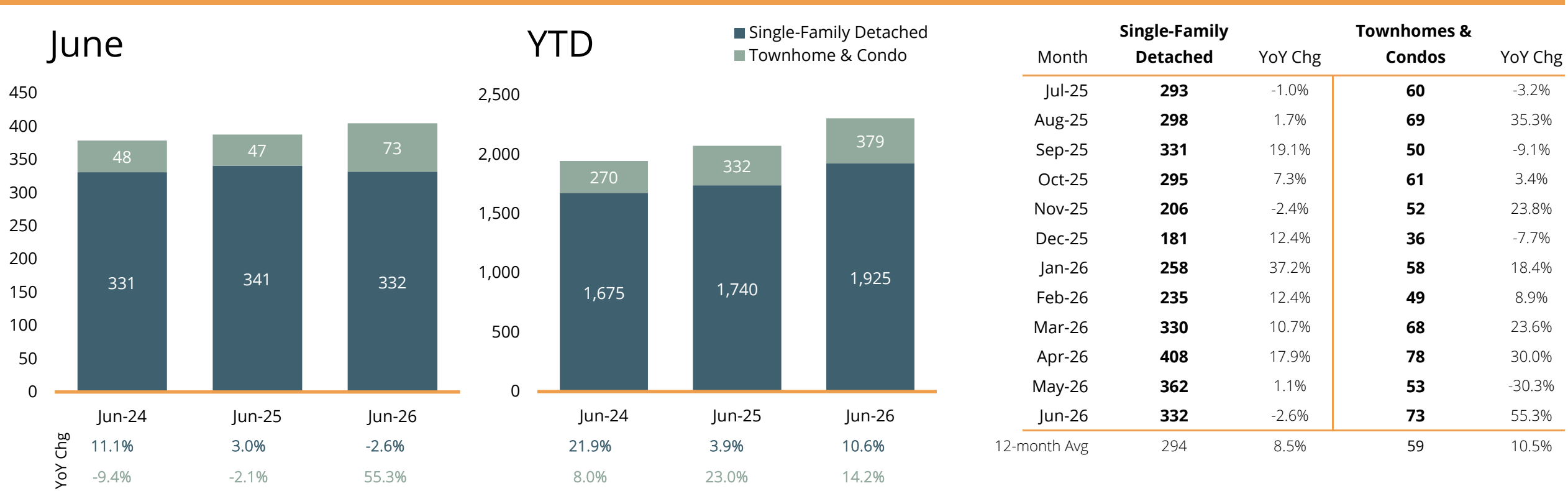


Historical Pending Sales by Month

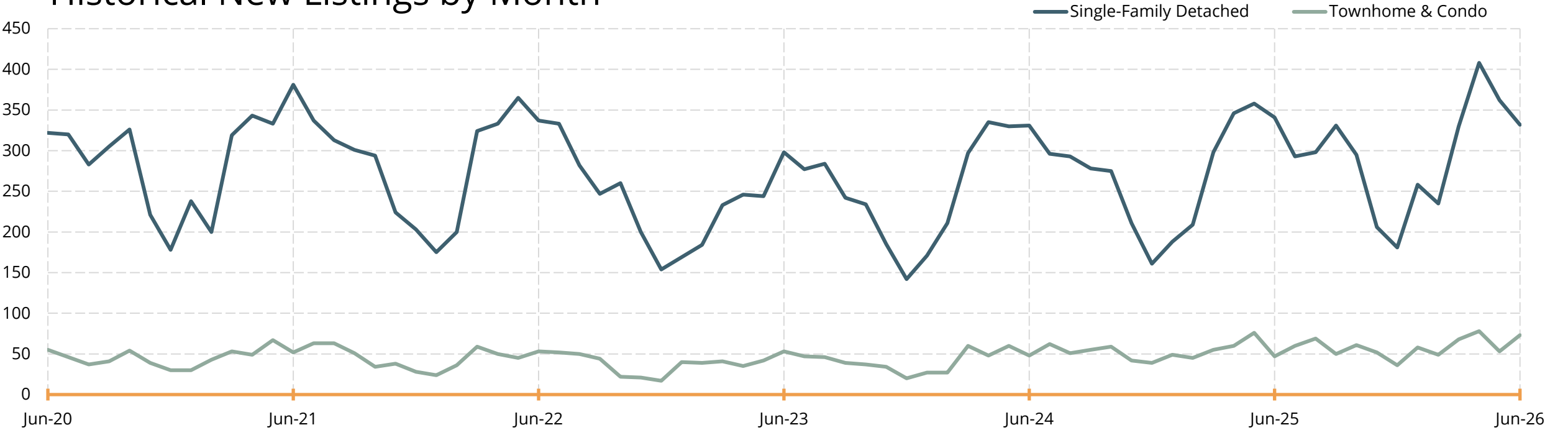


Source: Virginia REALTORS®, data accessed July 15, 2026

New Listings

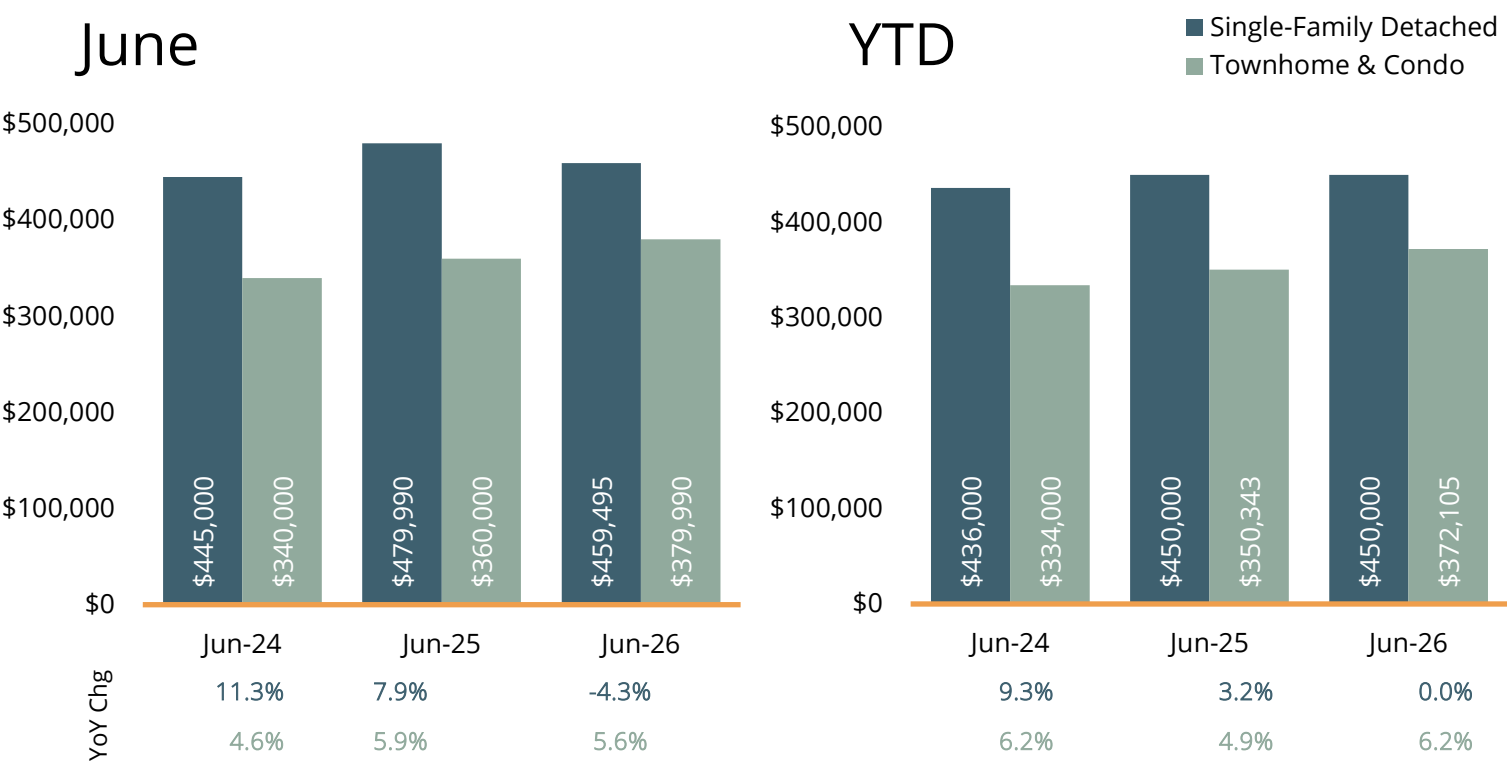


Historical New Listings by Month



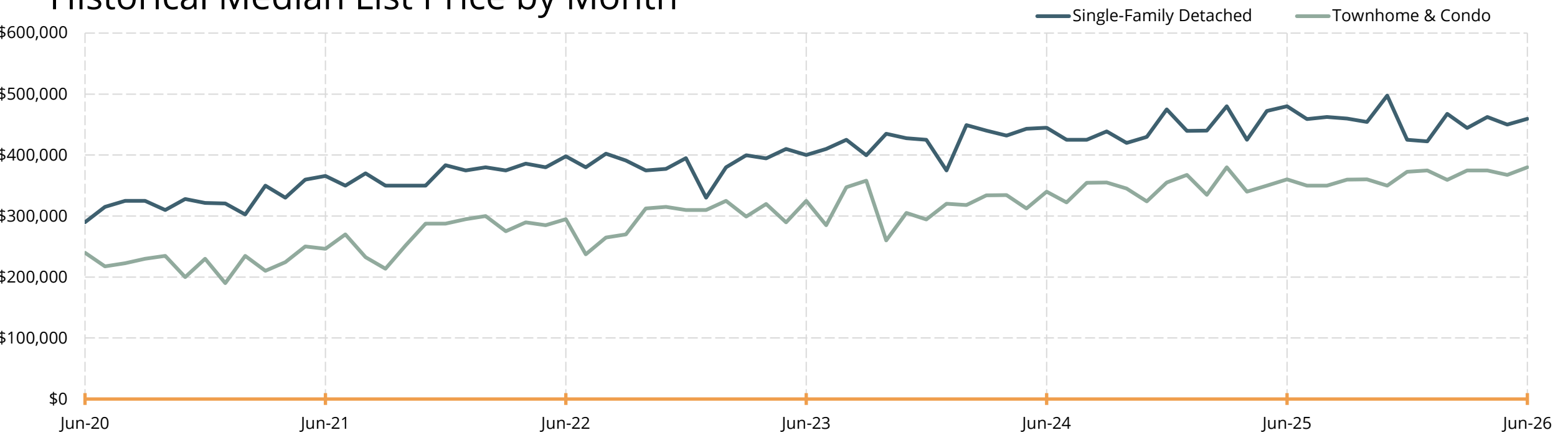
Source: Virginia REALTORS®, data accessed July 15, 2026

Median List Price



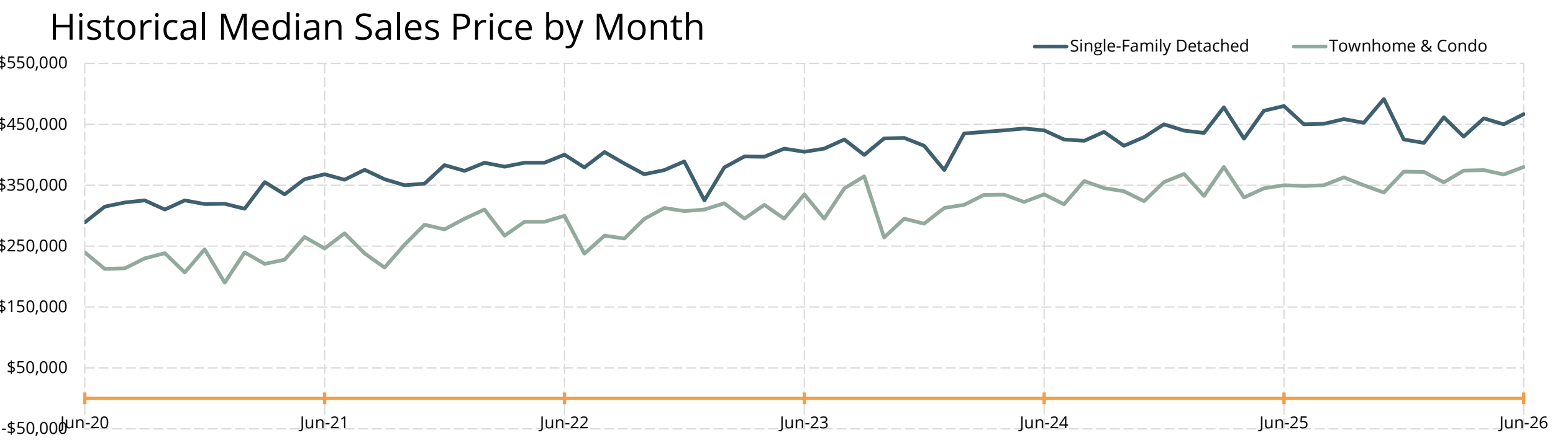
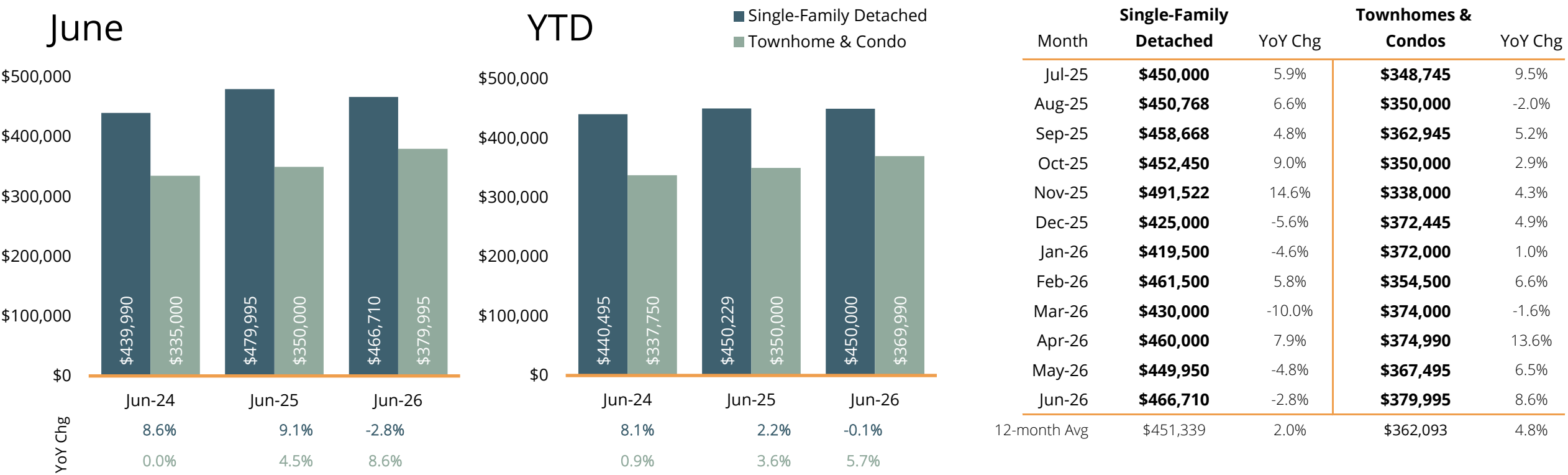
Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Jul-25	\$459,000	8.0%	\$349,945	8.5%
Aug-25	\$462,495	8.8%	\$350,000	-1.3%
Sep-25	\$460,000	4.8%	\$359,795	1.4%
Oct-25	\$454,500	8.2%	\$360,000	4.4%
Nov-25	\$497,500	15.7%	\$349,990	8.0%
Dec-25	\$425,000	-10.5%	\$372,445	4.9%
Jan-26	\$422,400	-3.9%	\$374,990	2.0%
Feb-26	\$467,450	6.3%	\$359,500	7.3%
Mar-26	\$444,450	-7.4%	\$375,000	-1.3%
Apr-26	\$462,450	8.8%	\$374,990	10.3%
May-26	\$449,950	-4.8%	\$367,450	5.0%
Jun-26	\$459,495	-4.3%	\$379,990	5.6%
12-month Avg	\$455,391	2.1%	\$364,508	4.4%

Historical Median List Price by Month



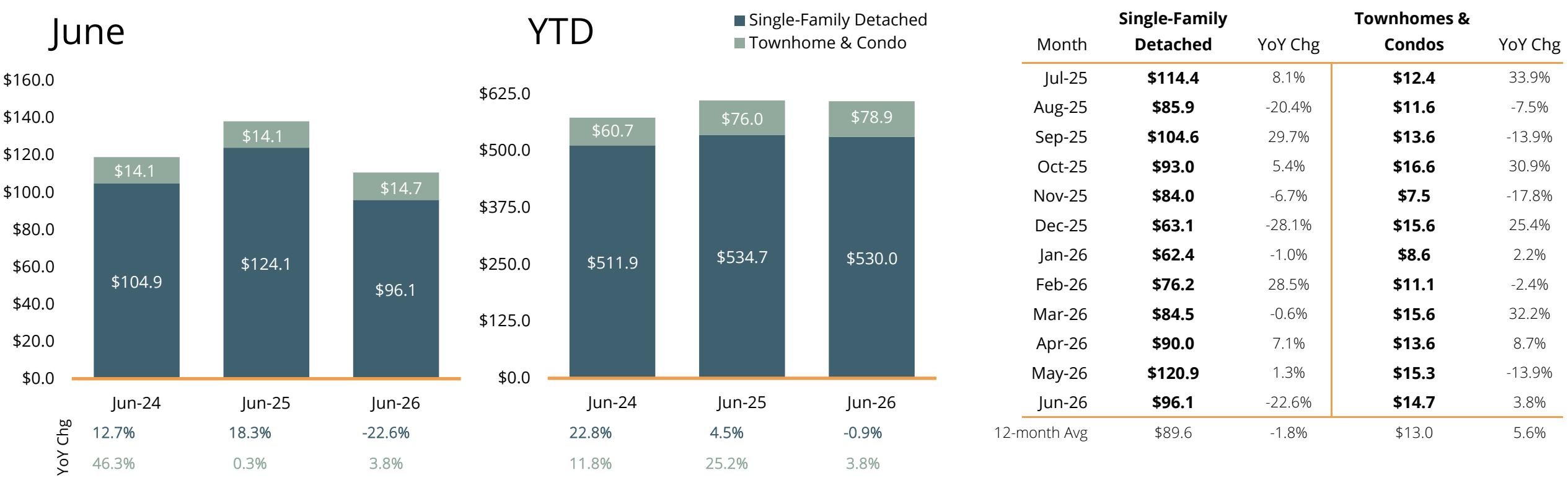
Source: Virginia REALTORS®, data accessed July 15, 2026

Median Sales Price

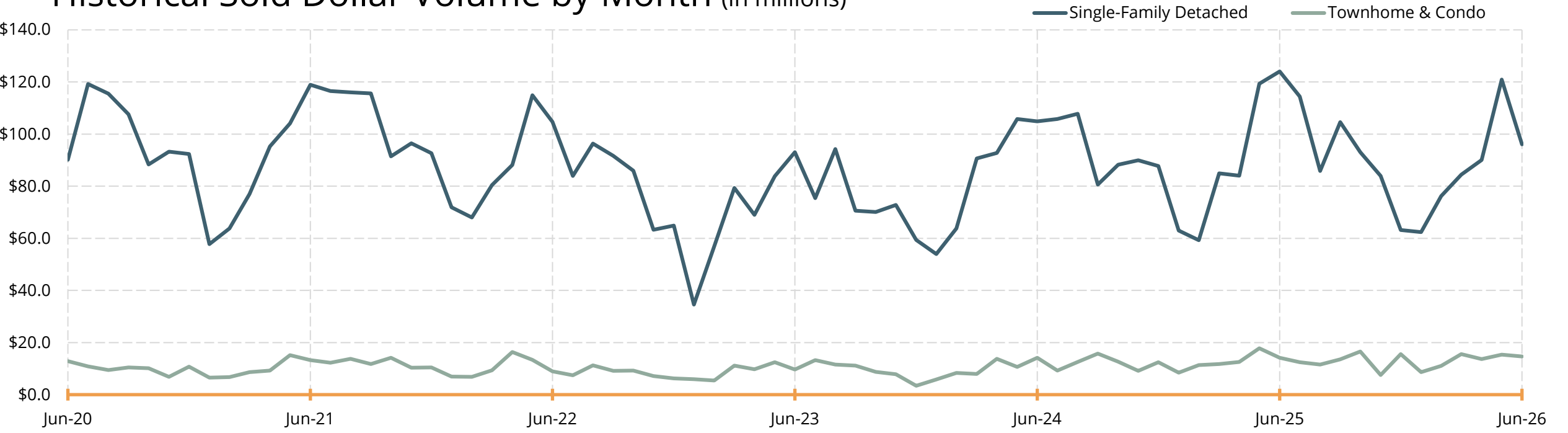


Source: Virginia REALTORS®, data accessed July 15, 2026

Sold Dollar Volume (in millions)

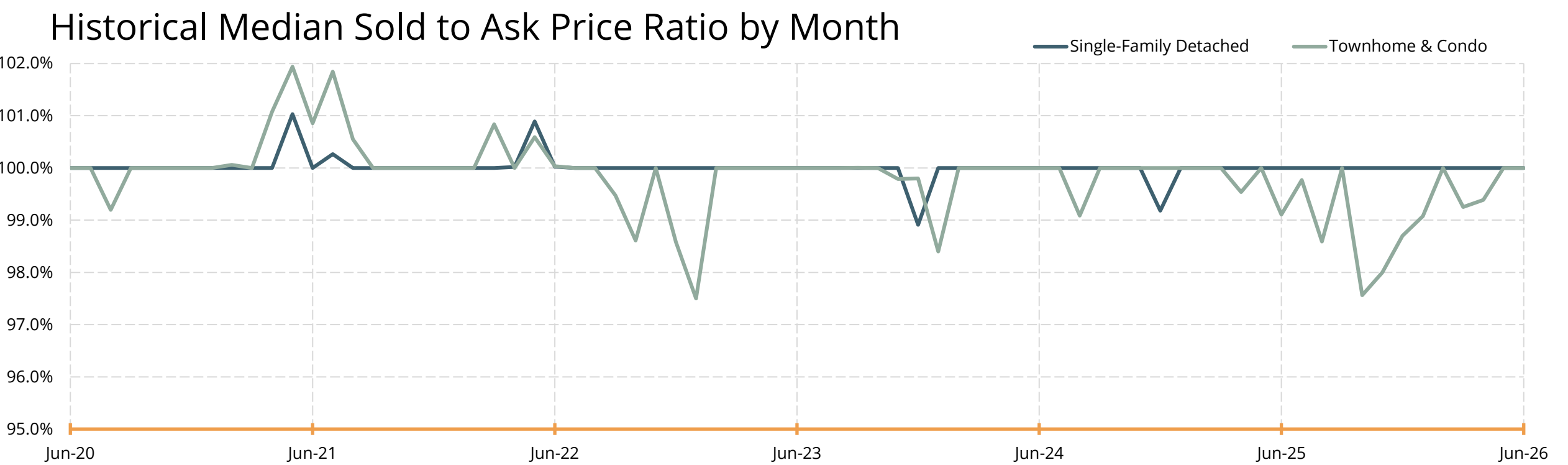
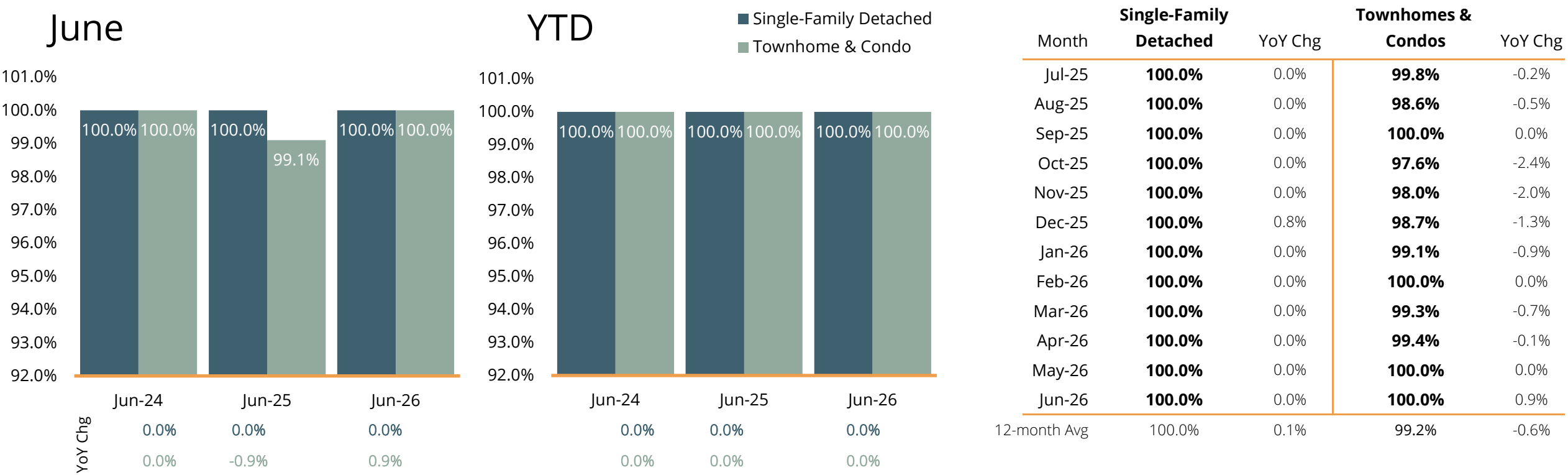


Historical Sold Dollar Volume by Month (in millions)



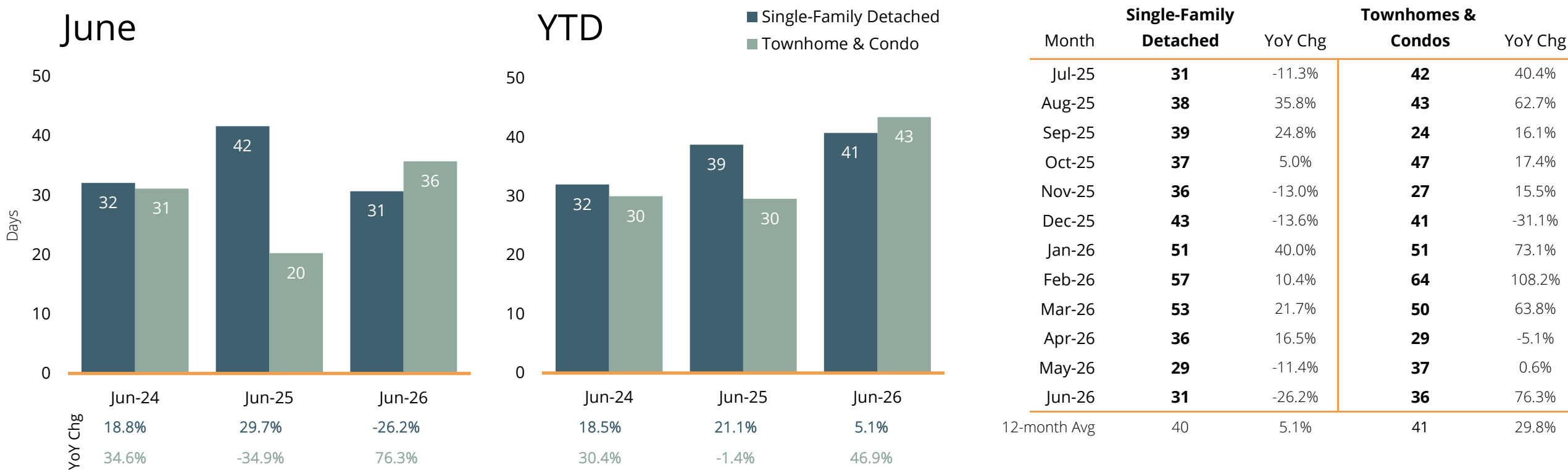
Source: Virginia REALTORS®, data accessed July 15, 2026

Median Sold to Ask Price Ratio

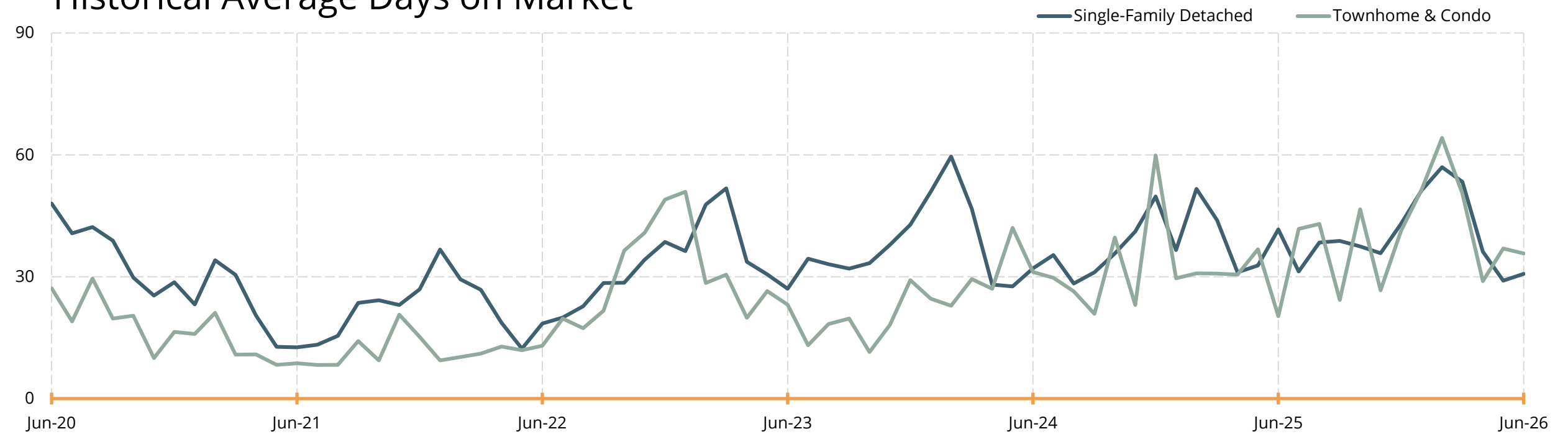


Source: Virginia REALTORS®, data accessed July 15, 2026

Average Days on Market



Historical Average Days on Market

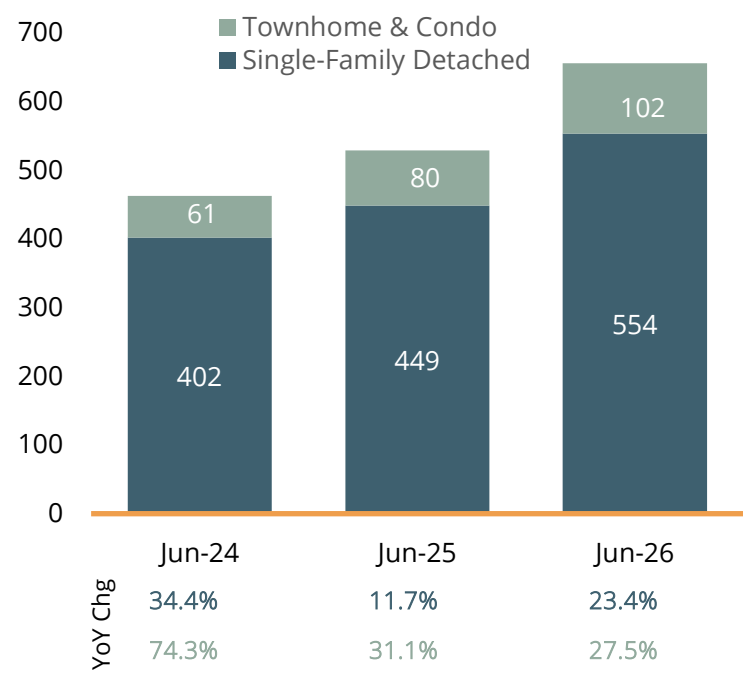


Source: Virginia REALTORS®, data accessed July 15, 2026

Active Listings

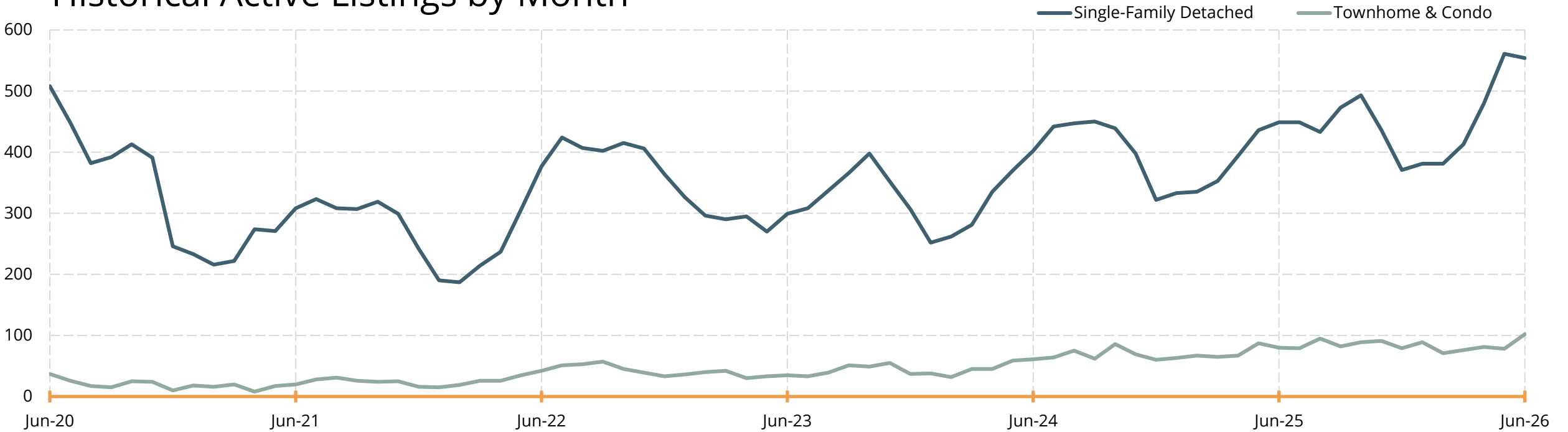


June



Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Jul-25	449	1.6%	79	23.4%
Aug-25	433	-3.1%	95	26.7%
Sep-25	473	5.1%	82	32.3%
Oct-25	493	12.3%	89	3.5%
Nov-25	436	9.5%	91	31.9%
Dec-25	371	15.2%	79	31.7%
Jan-26	381	14.4%	89	41.3%
Feb-26	381	13.7%	71	6.0%
Mar-26	413	17.0%	76	16.9%
Apr-26	480	21.8%	81	20.9%
May-26	561	28.7%	78	-10.3%
Jun-26	554	23.4%	102	27.5%
12-month Avg	452	13.1%	84	19.8%

Historical Active Listings by Month

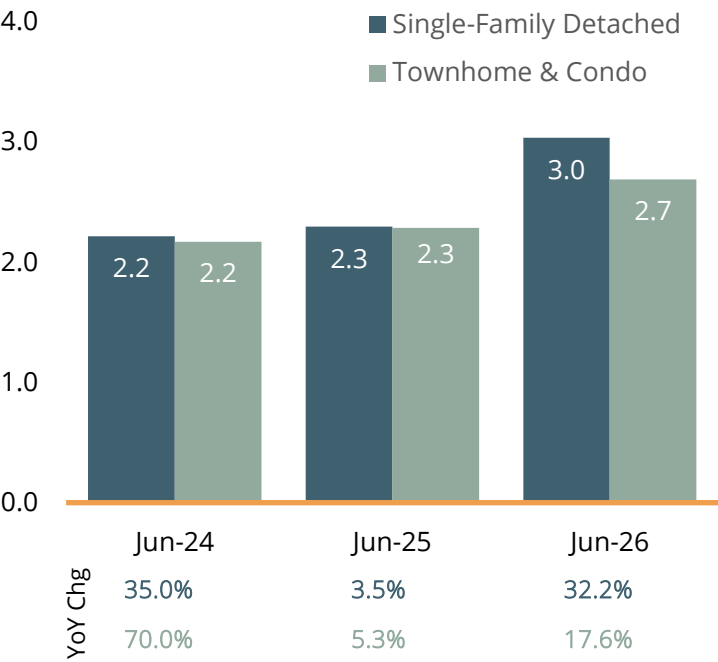


Source: Virginia REALTORS®, data accessed July 15, 2026

Months of Supply

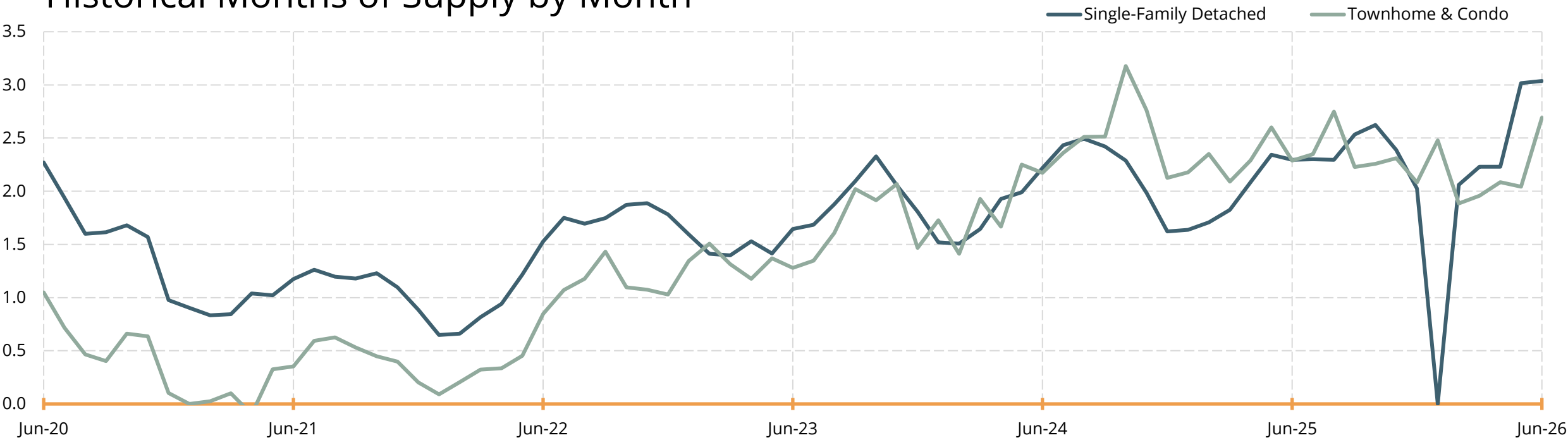


June



Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Jul-25	2.3	-5.4%	2.3	-0.5%
Aug-25	2.3	-7.9%	2.7	9.5%
Sep-25	2.5	4.7%	2.2	-11.3%
Oct-25	2.6	14.6%	2.3	-28.9%
Nov-25	2.4	20.3%	2.3	-16.4%
Dec-25	2.0	24.8%	2.1	-1.9%
Jan-26	0.0	-100.0%	2.5	13.8%
Feb-26	2.1	20.7%	1.9	-19.8%
Mar-26	2.2	22.2%	2.0	-6.4%
Apr-26	2.2	7.0%	2.1	-8.9%
May-26	3.0	28.7%	2.0	-21.5%
Jun-26	3.0	32.2%	2.7	17.6%
12-month Avg	2.2	6.4%	2.3	-7.3%

Historical Months of Supply by Month



Source: Virginia REALTORS®, data accessed July 15, 2026

Area Overview - Total Market



Geography	New Listings			Sales			Median Sales Price			Active Listings			Months Supply		
	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg
Clarke County	34	23	-32.4%	16	23	43.8%	\$612,000	\$596,000	-2.6%	36	44	22.2%	2.8	2.7	-5.7%
Frederick County	197	234	18.8%	168	126	-25.0%	\$459,995	\$432,000	-6.1%	295	384	30.2%	4.2	3.1	-26.5%
Warren County	105	95	-9.5%	69	61	-11.6%	\$418,000	\$399,900	-4.3%	139	150	7.9%	2.7	2.9	7.6%
Winchester	52	53	1.9%	30	30	0.0%	\$407,500	\$369,990	-9.2%	59	78	32.2%	2.0	2.9	41.6%

Area Overview - Total Market YTD



Geography	New Listings YTD			Sales YTD			Median Sales Price YTD			Active Listings YTD		
	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg
Clarke County	156	165	5.8%	69	105	52.2%	\$645,000	\$585,000	-9.3%	36	44	22.2%
Frederick County	1,257	1,326	5.5%	774	707	-8.7%	\$440,000	\$421,270	-4.3%	295	384	30.2%
Warren County	519	598	15.2%	281	308	9.6%	\$399,900	\$405,000	1.3%	139	150	7.9%
Winchester	256	297	16.0%	162	153	-5.6%	\$391,749	\$375,000	-4.3%	59	78	32.2%

Area Overview - Single Family Detached Market



Geography	New Listings			Sales			Median Sales Price			Active Listings			Months Supply		
	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg
Clarke County	34	23	-32.4%	14	23	64.3%	\$650,000	\$596,000	-8.3%	36	44	22.2%	3.0	2.7	-8.0%
Frederick County	159	181	13.8%	134	95	-29.1%	\$492,499	\$490,000	-0.5%	233	306	31.3%	2.2	3.2	43.3%
Warren County	101	84	-16.8%	68	57	-16.2%	\$419,000	\$400,000	-4.5%	132	141	6.8%	2.8	3.0	7.9%
Winchester	47	44	-6.4%	26	25	-3.8%	\$429,450	\$420,000	-2.2%	48	63	31.3%	2.0	2.9	41.3%

Area Overview - Single Family Detached Market YTD



Geography	New Listings YTD			Sales YTD			Median Sales Price YTD			Active Listings YTD		
	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg
Clarke County	134	153	14.2%	67	104	55.2%	\$650,000	\$590,500	-9.2%	36	44	22.2%
Frederick County	946	993	5.0%	604	537	-11.1%	\$481,000	\$475,000	-1.2%	233	306	31.3%
Warren County	445	538	20.9%	263	289	9.9%	\$400,000	\$420,000	5.0%	132	141	6.8%
Winchester	215	241	12.1%	131	120	-8.4%	\$399,500	\$380,000	-4.9%	48	63	31.3%

Area Overview - Townhome & Condo Market



Geography	New Listings			Sales			Median Sales Price			Active Listings			Months Supply		
	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg
Clarke County	0	0	n/a	2	0	-100.0%	\$283,700	\$0	-100.0%	0	0	n/a	0.0	0.0	n/a
Frederick County	38	53	39.5%	34	31	-8.8%	\$352,495	\$389,900	10.6%	62	78	25.8%	2.2	2.7	24.3%
Warren County	4	11	175.0%	1	4	300.0%	\$384,900	\$280,000	-27.3%	7	9	28.6%	2.2	2.3	6.2%
Winchester	5	9	80.0%	4	5	25.0%	\$350,000	\$359,990	2.9%	11	15	36.4%	2.1	3.0	43.1%

Area Overview - Townhome & Condo Market YTD



Geography	New Listings YTD			Sales YTD			Median Sales Price YTD			Active Listings YTD		
	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg	Jun-25	Jun-26	% chg
Clarke County	2	3	50.0%	2	1	-50.0%	\$283,700	\$200,000	-29.5%	0	0	n/a
Frederick County	265	294	10.9%	170	170	0.0%	\$350,000	\$374,000	6.9%	62	78	25.8%
Warren County	35	34	-2.9%	18	19	5.6%	\$297,200	\$349,900	17.7%	7	9	28.6%
Winchester	30	48	60.0%	31	33	6.5%	\$386,776	\$369,990	-4.3%	11	15	36.4%



The Virginia REALTORS® association is the largest professional trade association in Virginia, representing 35,000 REALTORS® engaged in the residential and commercial real estate business. The Virginia REALTORS® association serves as the advocate for homeownership and private property rights and represents the interests of real estate professionals and property owners in the Commonwealth of Virginia.

NOTE: The term REALTOR® is a registered collective membership mark that identifies a real estate professional who is a member of the National Association of REALTORS® and subscribes to its strict code of ethics.

All inquiries regarding this report may be directed to:

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804-622-7954

Data and analysis provided by Virginia REALTORS® Research Team

The numbers reported here are preliminary and based on current entries into multiple listing services. Over time, data may be adjusted slightly to reflect increased reporting. Information is sourced from multiple listing services across Virginia and is deemed reliable, but not guaranteed.