LAMORINDA MARKET UPDATE

Q2 2026

VANGUARD PROPERTIES

MARKET UPDATE

LAMORINDA | Q2 2026

Lamorinda's Q2 2026 market was defined by tightening supply and intensifying competition. The number of homes for sale at quarter-end fell 23.8% year over year to just 96, while the median time on market dropped 25% to an exceptionally fast nine days. More than half of all sales, 53.8%, closed above asking, up from 48.3% last year, and sellers received an average of 102.6% of list price.

Prices remained remarkably resilient. The median sales price held steady at $2 million, while price per square foot edged down just 0.5% to $848. Closed sales decreased 3.0% to 195, but homes going into contract increased 1.0% to 205. That forward-looking strength, combined with sharply lower inventory, suggests limited supply rather than weakening demand was the primary constraint on sales.

City-level results reinforce that story. Moraga led the quarter with a 63.0% surge in sales, a 1.2% increase in median price and an eight-day median market time. Orinda's median price rose 1.0% as inventory fell 36.4% and homes sold six days faster. Lafayette's median price declined 9.1%, but price per square foot was unchanged and homes sold in just nine days, pointing more toward a shift in the mix of properties sold than broad-based depreciation.

The broader financial backdrop also provided support. The S&P 500 gained 14.9% during Q2, its strongest quarter since 2020, a meaningful tailwind for an equity-sensitive market like Lamorinda. Mortgage rates remain elevated, but the average 30-year fixed rate was 6.55% in mid-July, below 6.75% one year earlier. Reuters Freddie Mac

The takeaway is clear. Lamorinda enters the second half of 2026 with stable prices, exceptionally fast sales and fewer homes available. Buyers remain engaged, and well-presented, appropriately priced properties continue to command strong competition.

SINGLE FAMILY HOMES

Q2 2026

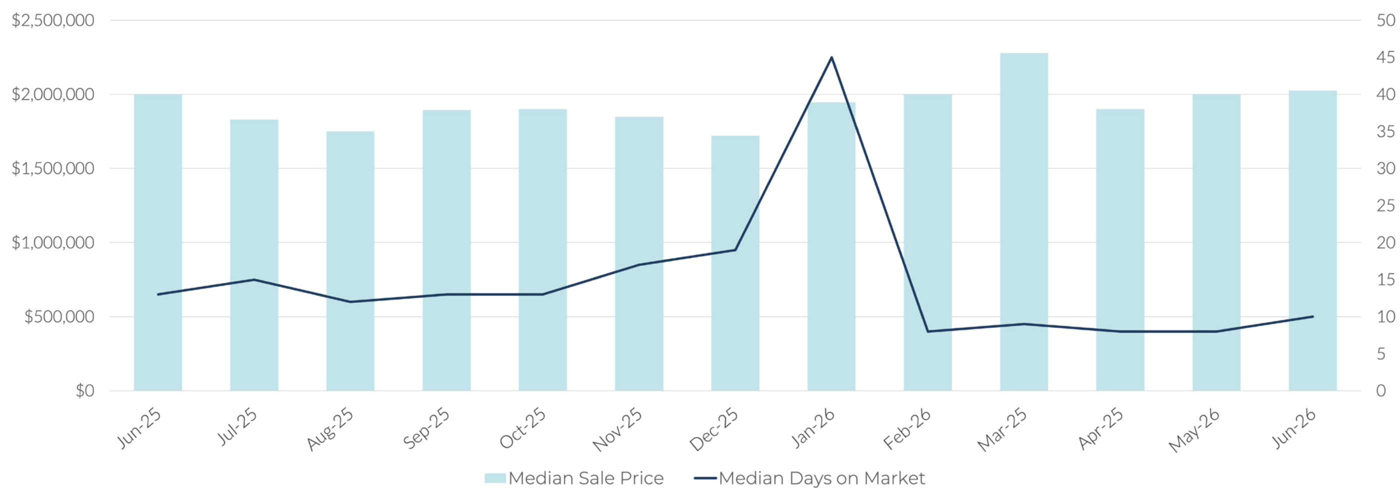
Median Sales Price	$2,000,000
Days on market	9 ↓
$ / SQ. FT.	$848 ↓
# For Sale On Last Day Of Quarter	96 ↓
Went Into Contract	205 ↑
Properties Sold	195 ↓

LAMORINDA MARKET UPDATE

Q2 2026

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH: SALES PRICE: **+1.3%** DAYS ON MARKET: **+2 days**

YEAR-OVER-YEAR COMPARISON

"Lamorinda's Q2 2026 market was defined by tightening supply and intensifying competition. The number of homes for sale at quarter-end fell 23.8% year over year to just 96, while the median time on market dropped 25% to an exceptionally fast nine days."

MEDIAN

	Q2-2026	Q2-2025	%Δ
Sales Price	$2,000,000	$2,000,000	0.0%
Days On Market	9	12	-25.0%
$ / SQ. FT.	$848	$852	-0.5%

TOTAL

	Q2-2026	Q2-2025	%Δ
Went Into Contract	205	203	+1.0%
Properties Sold	195	201	-3.0%
# For Sale Last Day of Quarter	96	126	-23.8%
% Of Properties Sold Over List	53.8%	48.3%	+11.4%
% Of List Price Received *(Average)*	102.6%	101.5%	+1.1%

Data is from January through April. Sources: SFAR Super Regional MLS & BrokerMetrics. Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors, omissions, revisions, and is not warranted. Equal Housing Opportunity. DRE No. 01486075

VANGUARD PROPERTIES

LAMORINDA MARKET UPDATE

Q2 2026

YEAR-OVER-YEAR REGION COMPARISON

LAFAYETTE	Q2-2026	Q2-2025	%Δ	2024
Median Sales Price	$2,000,000	$2,200,000	-9.1%	$1,985,000
Median Days on Market	9	10	-10.0%	10
Median Price Per Square Foot	$890	$890	0.0%	$853
Homes Sold	86	87	-1.1%	274
Homes for Sale Last Day of Quarter	45	51	-11.8%	11

MORAGA	Q2-2026	Q2-2025	%Δ	2024
Median Sales Price	$1,972,500	$1,950,000	+1.2%	$1,850,000
Median Days on Market	8	12	-33.3%	10
Median Price Per Square Foot	$794	$802	-1.0%	$770
Homes Sold	44*	27*	+63.0%	113
Homes for Sale Last Day of Quarter	16	20	-20.0%	2

ORINDA	Q2-2026	Q2-2025	%Δ	2024
Median Sales Price	$2,020,000	$2,000,000	+1.0%	$2,000,000
Median Days on Market	10	16	-37.5%	13
Median Price Per Square Foot	$810	$838	-3.3%	$824
Homes Sold	65	87	-25.3%	205
Homes for Sale Last Day of Quarter	35	55	-36.4%	12

*Small sample size; use caution when interpreting statistics. Data is from January through April. Sources: SFAR Super Regional MLS & BrokerMetrics. Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors, omissions, revisions, and is not warranted.

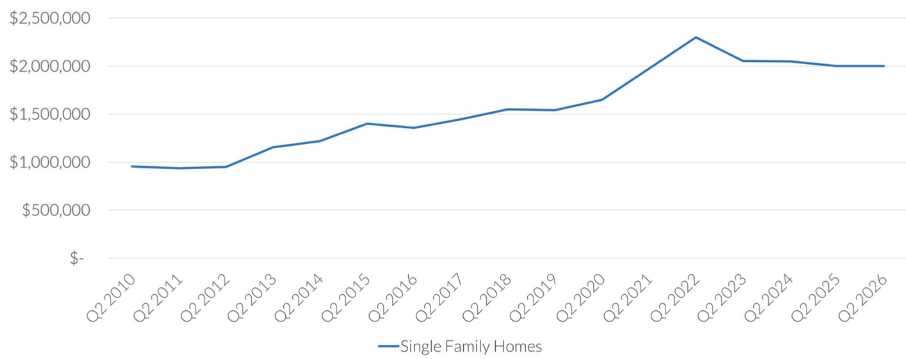
VANGUARD PROPERTIES

LAMORINDA MARKET UPDATE

Q2 2026

YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

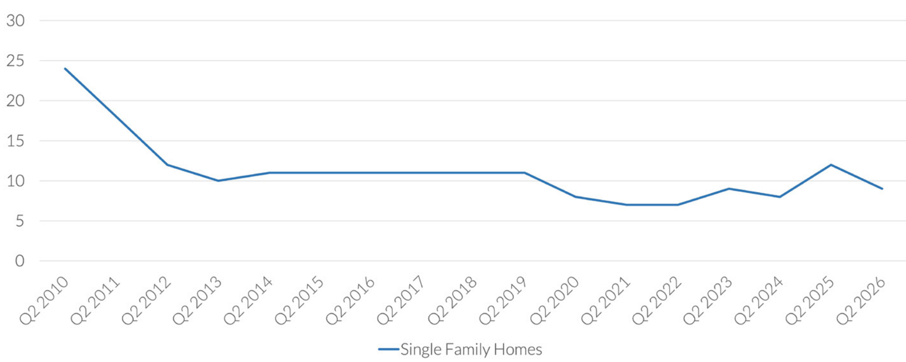


Single Family Residences

$2,000,000

No change year-over-year

MEDIAN MARKET TIME

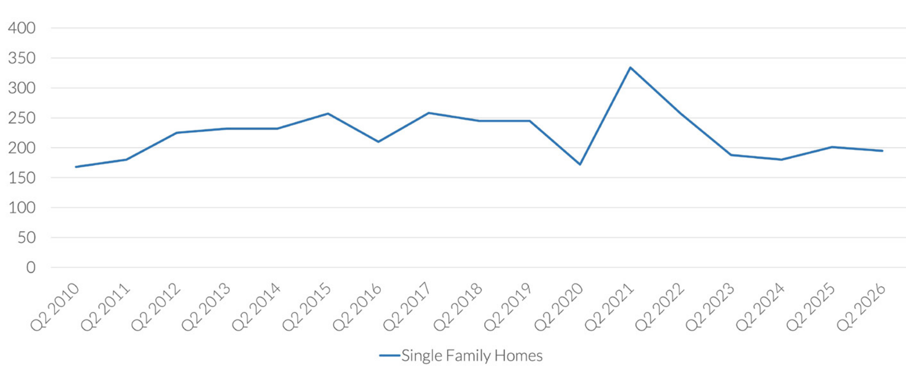


Single Family Residences

9 days

-3 day change year-over-year

NUMBER OF SALES



Single Family Residences

195

-3.0% change year-over-year

Data is from January through April. Sources: SFAR Super Regional MLS & BrokerMetrics. Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors, omissions, revisions, and is not warranted. Equal Housing Opportunity. DRE No. 01486075

VANGUARD PROPERTIES