



# LAMORINDA MARKET UPDATE

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SEPTEMBER 2025







## VANGUARD PROPERTIES

# MARKET UPDATE

LAMORINDA | SEPTEMBER 2025

As summer wrapped up without major shifts beyond the usual seasonal ebb and flow, the focus now turns to the fall selling season. This stretch typically runs from early September through mid-November before activity tapers for the midwinter holidays, and the early read is positive.

Year to date through August, the median sales price for single family homes ticked down just 0.3 percent to \$1,995,000, while median days on market rose slightly from 9 to 12 — still exceptionally fast. The median price per square foot held nearly flat at \$830.

Contracts rose 5.3 percent to 436 and closed sales edged up 0.2 percent, showing buyers remain active. Inventory grew 17 percent year over year to 110 homes, giving buyers more options, though competition remains healthy. Nearly half of homes (48.9 percent) still sold over asking, and sellers received an average of 101.7 percent of list price.

Perhaps the most encouraging development is on the financing side. Freddie Mac reported the 30-year fixed-rate mortgage fell 15 basis points from last week, the largest weekly drop in the past year. This decline is creating new opportunities for buyers to re-enter the market or expand their purchasing power. The shift is already fueling stronger demand, helping to offset the slower pace that characterized the summer months and building momentum for the months ahead.



### SINGLE FAMILY HOMES

#### YTD AUGUST 2025

Median Sales Price	\$1,995,000 ↓
Days on market	12 ↑
\$ / SQ. FT.	\$830 ↓
# For Sale On Last Day Of August	110 ↑
Went Into Contract	436 ↑
Properties Sold	405 ↑

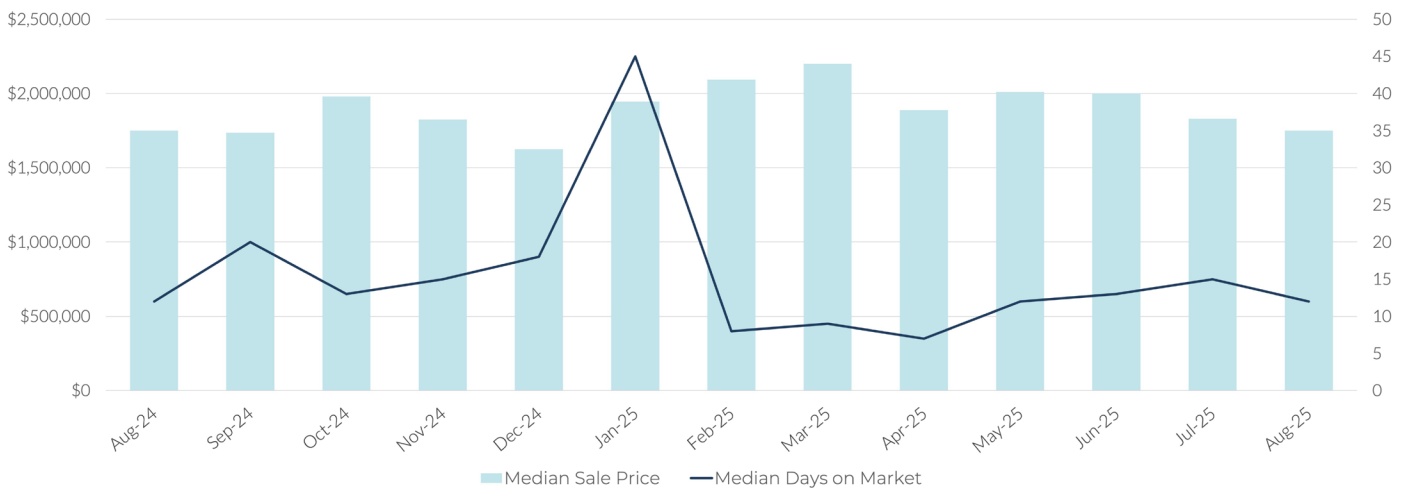


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## SINGLE FAMILY RESIDENCES

### MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **-4.4%**

DAYS ON MARKET: **-3 days**

### YEAR-OVER-YEAR COMPARISON

**"Inventory grew 17 percent year over year to 110 homes, giving buyers more options, though competition remains healthy."**

	YTD AUG 2025	YTD AUG 2024	MEDIAN %Δ
Sales Price	\$1,995,000	\$2,000,000	-0.3%
Days On Market	12	9	+33.3%
\$ / SQ. FT.	\$830	\$831	-0.1%

	YTD AUG 2025	YTD AUG 2024	TOTAL %Δ
Went Into Contract	436	414	+5.3%
Properties Sold	405	404	+0.2%
# For Sale Last Day of August	110	94	+17.0%
% Of Properties Sold Over List	48.9%	54.5%	-10.3%
% Of List Price Received (Average)	101.7%	103.7%	-1.9%

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## YEAR-OVER-YEAR REGION COMPARISON

LAFAYETTE	YTD AUGUST 2025	YTD AUGUST 2024	%Δ	2023
Median Sales Price	\$2,051,028	\$1,985,000	+3.3%	\$1,900,000
Median Days on Market	10	9	+11.1%	11
Median Price Per Square Foot	\$885	\$857	+3.3%	\$812
Homes Sold	181	188	-3.7%	226
Homes for Sale Last Day of August	44	40	+10.0%	22
MORAGA	YTD AUGUST 2025	YTD AUGUST 2024	%Δ	2023
Median Sales Price	\$1,800,000	\$1,890,000	-4.8%	\$1,900,000
Median Days on Market	12	9	+33.3%	9
Median Price Per Square Foot	\$797	\$774	+3.0%	\$844
Homes Sold	65	74	-12.2%	101
Homes for Sale Last Day of August	22	16	37.5%	7
ORINDA	YTD AUGUST 2025	YTD AUGUST 2024	%Δ	2023
Median Sales Price	\$1,875,000	\$2,122,500	-11.7%	\$1,975,000
Median Days on Market	13	11	+18.2%	11
Median Price Per Square Foot	\$821	\$828	-0.8%	\$811
Homes Sold	159	142	+12.0%	183
Homes for Sale Last Day of August	44	38	+15.8%	19

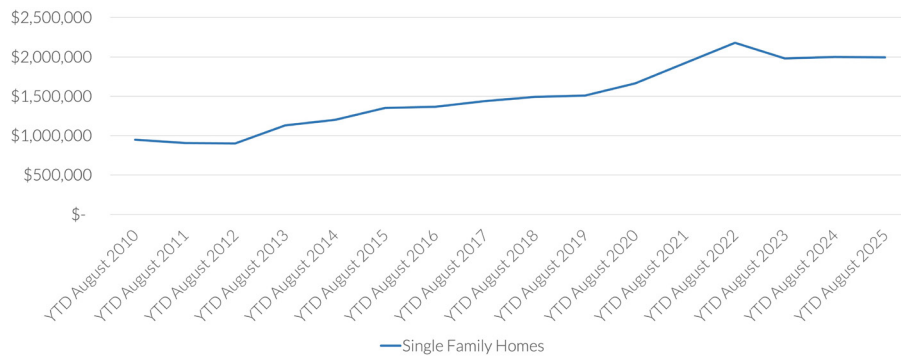
\*Small sample size; use caution when interpreting statistics. Data is from January through April. Sources: SFAR Super Regional MLS & BrokerMetrics.  
Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy.  
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## YEAR-OVER-YEAR COMPARISONS

### MEDIAN SALE PRICE

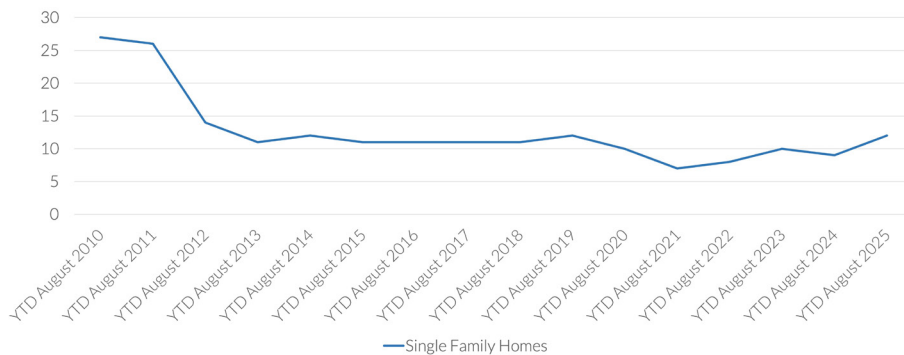


Single Family Residences

**\$1,995,000**

-0.3% change year-over-year

### MEDIAN MARKET TIME

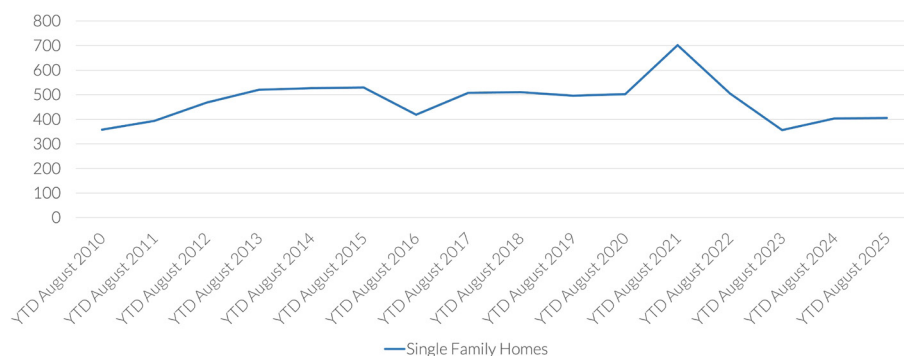


Single Family Residences

**12 days**

+3 day change year-over-year

### NUMBER OF SALES



Single Family Residences

**405**

+0.2% change year-over-year