MARIN COUNTY MARKET UPDATE

Q2 2026

VANGUARD PROPERTIES

MARKET UPDATE

MARIN COUNTY | Q2 2026

Marin County's single-family home market strengthened considerably in Q2, as closed sales increased 17.7% to 713 while quarter-end inventory fell 36.5% to just 242 homes. This sharp absorption of available supply intensified competition, with 57.5% of homes selling above asking price, up from 49.2% last year, and sellers receiving an average of 104.7% of list price.

Pricing and market velocity also improved. The median single-family home price increased 3.5% to $1,865,000, while price per square foot rose a stronger 5.8% to $956. Homes sold in a median of just 13 days, four days faster than last year. Pending sales rose a more moderate 7.0% to 655; the fact that closed sales exceeded recorded contracts likely reflects a combination of off-market transactions entered directly as sold and homes that went into contract before the quarter began.

The condominium market also experienced a significant increase in activity. Pending sales jumped 22.5% to 109, while completed sales rose 13.9% to 123. Inventory increased modestly by 7.1%, providing buyers with more selection and contributing to a longer median market time of 38 days. Although the median price declined 5.4% to $679,000, price per square foot increased 2.8% to $621, suggesting that the headline decrease was influenced partly by the mix of units sold rather than a broad decline in values. Seller results improved as well, with a greater share of condominiums selling above asking and the average sale-to-list ratio rising to 99.3%.

The broader environment remains supportive. Marin County's unemployment rate declined to 3.4% in May, below both the prior month and the year-ago level. Mortgage rates remain volatile but are also below last year, with the average 30-year fixed rate at 6.49% on July 9, compared with 6.72% one year earlier.

Overall, Q2 reflected a Marin market with strong momentum. Single-family homes remain firmly seller-favored, while the sharp increase in condominium activity shows that demand is broadening across property types. Well-prepared and strategically priced homes should remain well positioned as the market moves into the second half of 2026.

SINGLE FAMILY HOMES

Q2 2026

Median Sales Price	$1,865,000 ↑
Days on market	13 ↓
$ / SQ. FT.	$956 ↑
# For Sale On Last Day Of Quarter	242 ↓
Went Into Contract	655 ↑
Properties Sold	713 ↑

CONDOMINIUMS

Q2 2026

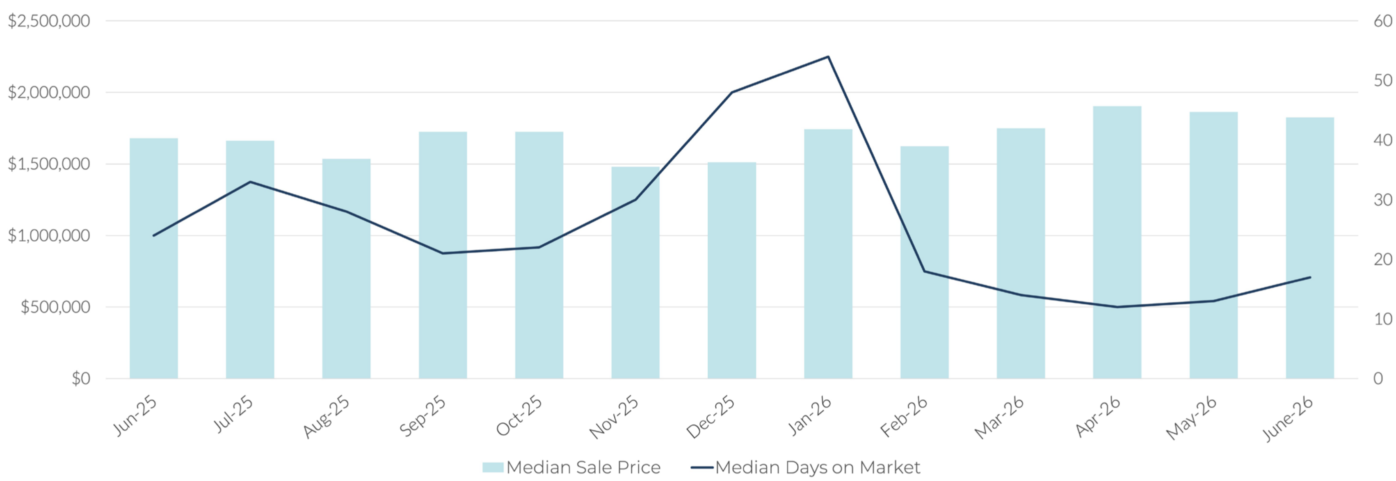
Median Sales Price	$679,000 ↓
Days On Market	38 ↑
$ / Sq. Ft.	$621 ↑
# For Sale Last Day Of Quarter	105 ↑
Went Into Contract	109 ↑
Properties Sold	123 ↑

MARIN COUNTY MARKET UPDATE

Q2 2026

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH: SALES PRICE: **-2.1%** DAYS ON MARKET: **+4 days**

YEAR-OVER-YEAR COMPARISON

"Marin County's single-family home market strengthened considerably in Q2, as closed sales increased 17.7% to 713 while quarter-end inventory fell 36.5% to just 242 homes."

MEDIAN

	Q2-2026	Q2-2025	%Δ
Sales Price	$1,865,000	$1,802,508	+3.5%
Days On Market	13	17	-23.5%
$ / SQ. FT.	$956	$904	+5.8%

TOTAL

	Q2-2026	Q2-2025	%Δ
Went Into Contract	655	612	+7.0%
Properties Sold	713	606	+17.7%
# For Sale Last Day of Quarter	242	381	-36.5%
% Of Properties Sold Over List	57.5%	49.2%	+16.9%
% Of List Price Received *(Average)*	104.7%	102.2%	+2.4%

VANGUARD PROPERTIES

MARIN COUNTY MARKET UPDATE

Q2 2026

SINGLE FAMILY RESIDENCES

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	Q2-2026	Q2-2025	%Δ	Q2-2026	Q2-2025	%Δ	Q2-2026	Q2-2025	%Δ
Belvedere	13*	9*	▲ 44%	12	56	▼ 79%	$6,500,000	$4,750,000	▲ 37%
Corte Madera	28*	22*	▲ 27%	8	19	▼ 58%	$2,125,000	$1,887,500	▲ 13%
Fairfax	35*	27*	▲ 30%	14	19	▼ 26%	$1,260,000	$1,200,000	▲ 5%
Greenbrae	18*	13*	▲ 38%	12	14	▼ 14%	$2,592,500	$2,425,000	▲ 7%
Kentfield	16*	21*	▼ 24%	9	17	▼ 47%	$3,825,000	$3,176,625	▲ 20%
Larkspur	20*	19*	▲ 5%	13	9	▲ 44%	$3,620,000	$2,730,000	▲ 33%
Mill Valley	116	100	▲ 16%	9	9	0%	$2,630,000	$2,345,000	▲ 12%
Novato	136	121	▲ 12%	21	21	0%	$1,299,000	$1,335,000	▼ 3%
Ross	16*	12*	▲ 33%	10	9	▲ 11%	$5,000,000	$3,325,000	▲ 50%
San Anselmo	66	53	▲ 25%	9	14	▼ 36%	$1,735,000	$1,998,000	▼ 13%
San Rafael	150	129	▲ 16%	14	20	▼ 30%	$1,600,000	$1,525,000	▲ 5%
Sausalito	16*	20*	▼ 20%	8	17	▼ 53%	$2,975,000	$2,522,500	▲ 18%
Stinson Beach	9*	3*	▲ 200%	24	34	▼ 29%	$3,825,000	$6,900,000	▼ 45%
Tiburon	44*	37*	▲ 19%	10	25	▼ 60%	$3,461,000	$3,675,000	▼ 6%
MARIN COUNTY	713	606	▲ 18%	13	17	▼ 24%	$1,865,000	$1,802,508	▲ 3%

** Denotes small sample size; Use caution when intrepreting results.* 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

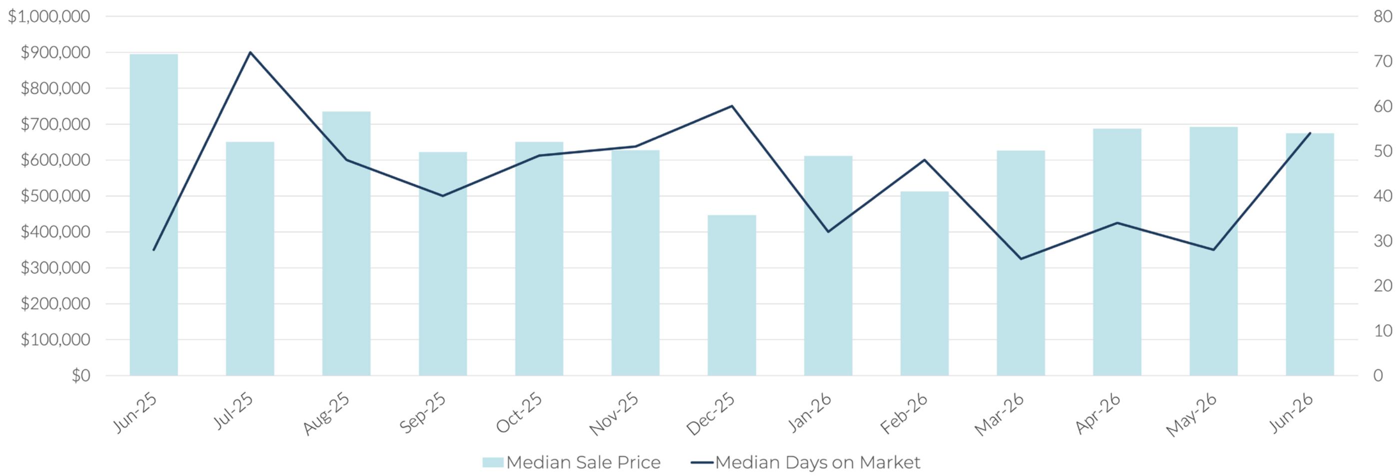
VANGUARD PROPERTIES

MARIN COUNTY MARKET UPDATE

Q2 2026

CONDOMINIUMS

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH: SALES PRICE: -2.5% DAYS ON MARKET: +26 days

YEAR-OVER-YEAR COMPARISON

"The condominium market also experienced a significant increase in activity. Pending sales jumped 22.5% to 109, while completed sales rose 13.9% to 123."

MEDIAN

	Q2-2026	Q2-2025	%Δ
Sales Price	$679,000	$717,500	-5.4%
Days On Market	38	32	+18.8%
$ / SQ. FT.	$621	$604	+2.8%

TOTAL

	Q2-2026	Q2-2025	%Δ
Went Into Contract	109	89	+22.5%
Properties Sold	123	108	+13.9%
# For Sale Last Day of Quarter	105	98	+7.1%
% Of Properties Sold Over List	28.5%	26.9%	+5.9%
% Of List Price Received *(Average)*	99.3%	99.0%	+0.3%

VANGUARD PROPERTIES

MARIN COUNTY MARKET UPDATE

Q2 2026

CONDOMINIUMS

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	Q2-2026	Q2-2025	%Δ	Q2-2026	Q2-2025	%Δ	Q2-2026	Q2-2025	%Δ
Belvedere	0	0	-	-	-	-	-	-	-
Corte Madera	4*	4*	0%	50	26	▲ 92%	$677,000	$927,000	▼ 27%
Fairfax	0	0	-	-	-	-	-	-	-
Greenbrae	7*	10*	▼ 30%	21	35	▼ 40%	$755,000	$732,500	▲ 3%
Kentfield	2*	1*	▲ 100%	26	120	▼ 78%	$1,075,000	$560,000	▲ 92%
Larkspur	8*	5*	▲ 60%	24	40	▼ 40%	$1,147,500	$630,000	▲ 82%
Mill Valley	17*	8*	▲ 113%	10	14	▼ 29%	$1,400,000	$1,085,000	▲ 29%
Novato	27*	29*	▼ 7%	38	41	▼ 7%	$490,000	$550,000	▼ 11%
Ross	0	0	-	-	-	-	-	-	-
San Anselmo	0	1*	▼ 100%	-	23	-	-	$1,100,000	-
San Rafael	39*	36*	▲ 8%	42	33	▲ 27%	$560,000	$672,000	▼ 17%
Sausalito	13*	8*	▲ 63%	45	26	▲ 73%	$925,000	$997,500	▼ 7%
Stinson Beach	0	0	-	-	-	-	-	-	-
Tiburon	5*	6*	▼ 17%	68	8	▲ 750%	$1,795,000	$1,460,000	▲ 23%
MARIN COUNTY	123	108	▲ 14%	38	32	▲ 19%	$679,000	$717,500	▼ -5%

** Denotes small sample size; Use caution when intrepreting results.* 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.

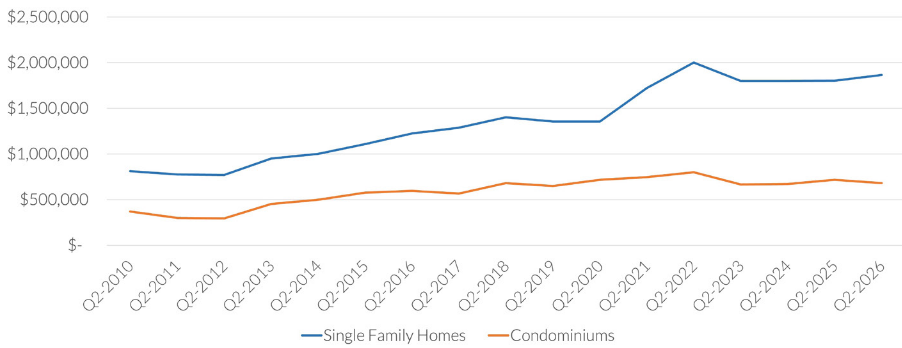
VANGUARD PROPERTIES

MARIN COUNTY MARKET UPDATE

Q2 2026

YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE



Single Family Residences

$1,865,000

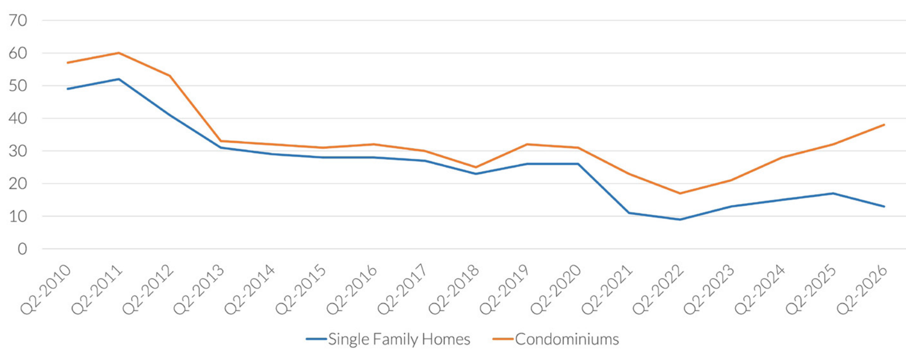
+3.5% change year-over-year

Condominiums

$679,000

-5.4% change year-over-year

MEDIAN MARKET TIME



Single Family Residences

13 days

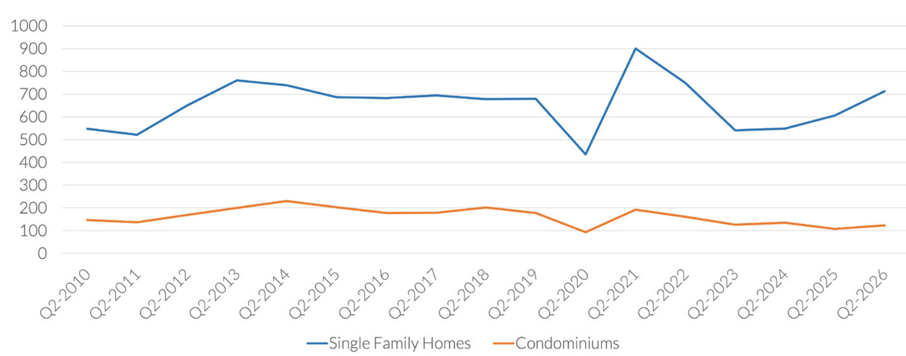
-4 day change year-over-year

Condominiums

38 days

-6 day change year-over-year

NUMBER OF SALES



Single Family Residences

713

+17.7% change year-over-year

Condominiums

123

+13.9% change year-over-year

** Denotes small sample size; Use caution when intrepreting results.* 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