



LAMORINDA MARKET UPDATE

Q2 2025





VANGUARD PROPERTIES

MARKET UPDATE

LAMORINDA | Q2 2025

The Lamorinda housing market showed robust activity in the second quarter of 2025, even as the median sales price posted a modest year-over-year decline. Buyer demand remained strong, with homes still moving at one of the fastest clips in the Bay Area, and nearly half of all sales closing over list price, a testament to the area's enduring desirability.

The median sales price for single-family homes dipped 2.4% from Q2 2024 to \$2,000,000. Despite the price softening, the market remained competitive: homes spent a median of just 12 days on market, up slightly from last year but still among the quickest in the region. The median price per square foot inched up 0.7% to \$852.

Buyer activity picked up meaningfully, with 203 homes going into contract (up 11.5%) and 201 homes closing escrow (up 12.3%) compared to the same period last year. Inventory grew as well, with a 23.5% increase in active listings by the end of the quarter.

48.3% of homes sold over asking, down from last year's highs, but still a strong figure, and sellers received an average of 101.5% of list price. The months supply of inventory (MSI) ticked up to 1.8, indicating a slight shift toward balance but still favoring sellers overall.

Mortgage rates have remained relatively steady under 7%, with minor weekly fluctuations. While affordability challenges persist, rate stability and rising inventory may encourage more buyers to enter the market, especially as we head into the traditionally slower summer months. Activity often picks up again in the fall before winding down for the holidays.

While Lamorinda's median home price edged down year over year, the fundamentals of the market remain strong. Homes are still moving quickly, nearly half are selling over list, and buyer activity picked up. With more inventory available and interest rates holding steady, the next few months could present good opportunities before the fall rush.



SINGLE FAMILY HOMES

Q2 2025

Median Sales Price	\$2,000,000 ↓
Days on market	12 ↑
\$ / SQ. FT.	\$852 ↑
# For Sale On Last Day Of Quarter	126 ↑
Went Into Contract	203 ↑
Properties Sold	201 ↑

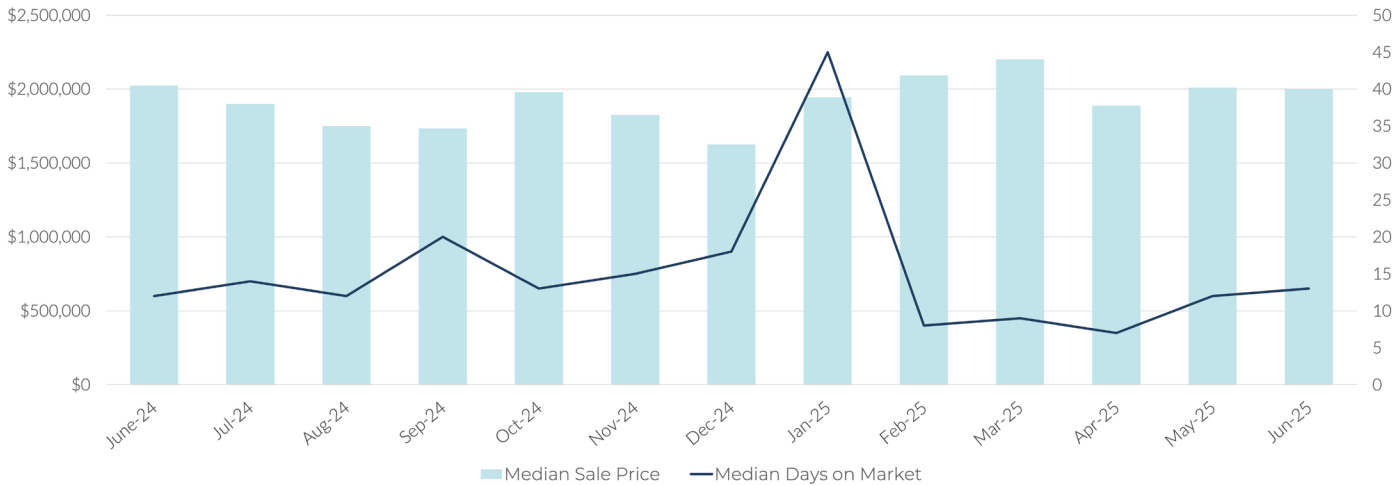


LAMORINDA MARKET UPDATE

Q2 2025

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **-0.5%**

DAYS ON MARKET: **+1 day**

YEAR-OVER-YEAR COMPARISON

"Buyer activity picked up meaningfully, with 203 homes going into contract (up 11.5%) and 201 homes closing escrow (up 12.3%)."

	Q2 2025	Q2 2024	%Δ
Sales Price	\$2,000,000	\$2,050,000	-2.4%
Days On Market	12	8	+50.0%
\$ / SQ. FT.	\$852	\$846	+0.7%

	Q2 2025	Q2 2024	%Δ
Went Into Contract	203	182	+11.5%
Properties Sold	201	179	+12.3%
# For Sale Last Day of Quarter	126	102	+23.5%
% Of Properties Sold Over List	48.3%	60.9%	-20.7%
% Of List Price Received (Average)	101.5%	104.4%	-2.8%

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YEAR-OVER-YEAR REGION COMPARISON

LAFAYETTE	Q2 2025	Q2 2024	%Δ	2023
Median Sales Price	\$2,200,000	\$2,200,000	0.0%	\$1,900,000
Median Days on Market	10	8	+25.0%	11
Median Price Per Square Foot	\$890	\$879	+1.3%	\$812
Homes Sold	87	82	+6.1%	226
Homes for Sale Last Day of Quarter	51	44	+15.9%	22
MORAGA	Q2 2025	Q2 2024	%Δ	2023
Median Sales Price	\$1,950,000	\$1,925,000	+1.3%	\$1,900,000
Median Days on Market	12	8	+50.0%	9
Median Price Per Square Foot	\$802	\$721	+11.2%	\$844
Homes Sold	27*	35*	-22.9%	101
Homes for Sale Last Day of Quarter	20	16	+25.0%	7
ORINDA	Q2 2025	Q2 2024	%Δ	2023
Median Sales Price	\$2,000,000	\$2,040,000	-2.0%	\$1,975,000
Median Days on Market	16	9	+77.8%	11
Median Price Per Square Foot	\$838	\$826	+1.5%	\$811
Homes Sold	87	62	-8.1%	183
Homes for Sale Last Day of Quarter	55	42	+31.0%	19

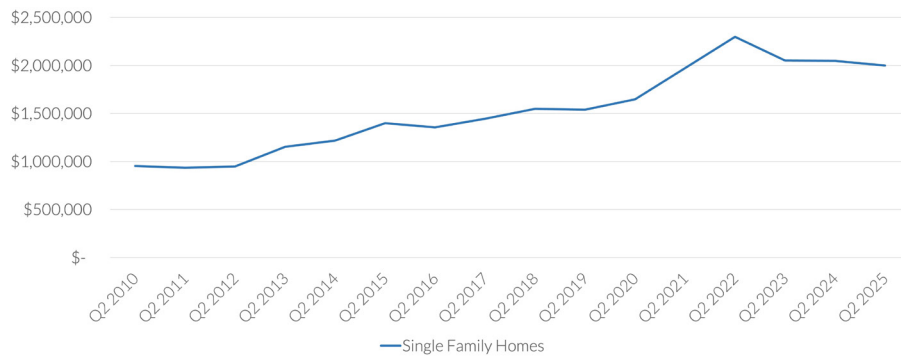
*Small sample size; use caution when interpreting statistics. Data is from January through April. Sources: SFAR Super Regional MLS & BrokerMetrics.
Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy.
All data is subject to errors, omissions, revisions, and is not warranted. ©2025 Vanguard Properties. All rights reserved. Equal Housing Opportunity. DRE

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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

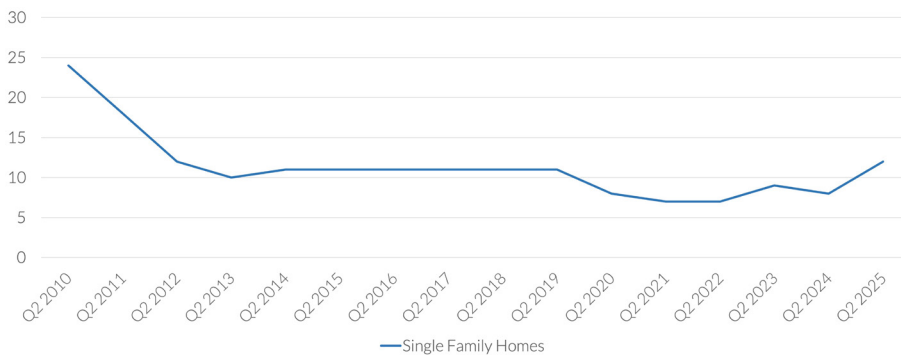


Single Family Residences

\$2,000,000

-2.4% change year-over-year

MEDIAN MARKET TIME

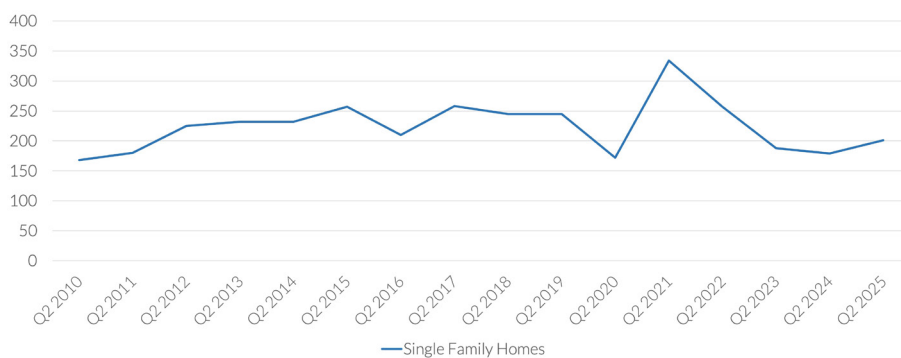


Single Family Residences

12 days

+4 day day change year-over-year

NUMBER OF SALES



Single Family Residences

201

+12.3% change year-over-year