MOMENTUM REALTY

MOMENTUM MARKET PULSE™
INDEPENDENT HOUSING RESEARCH

DAYTONA BEACH · MONTHLY REPORT

October 2026 *Market Pulse*



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Daytona Beach Area MLS · October 2026
Computed from closed records through 2026-11-19

MEDIAN SOLD · SF
$375,000 +3.6%

monthly median

SAME-HOME APPRECIATION
+0.8% /yr

same home, bought 1-3 yrs ago

DAYS ON MARKET
85 -6.1%

list → close, median

NEW CONTRACTS (OCTOBER)
n/a

counted once deals close

MONTHS OF SUPPLY
4.4 SF
balanced

SOLD OVER LIST
6% +41.5%

buyer competition



Moderate buyer advantage

A single 0-100 read of seller vs. buyer advantage, blending months of supply, days on market, the share selling over list, and the share of active listings cutting price. October: median +3.6% year over year. Up 1 points from September (23).

Supply **52** Speed **7** Over-list **18** Price cuts **17**



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Daytona Beach Area MLS data · closings through 2026-11-19

Executive summary

THE SIGNATURE FINDING

The median moved +3.6% year over year; the same homes, sold twice, moved +0.8% a year.

The median was $375,000 (+3.6% YoY); **the same house, sold twice, moved +0.8% a year**. Sales mix by price: the share of sales under $200K went 6%→5% and $600K+ went 16%→18%. Median $/sq ft +1.8% YoY.

$375,000
Median price — **+3.6% YoY**

345
Single-family closings in October — **-16.3% vs a year ago**

53%
Of **current active listings** have cut their price (point-in-time, as of 2026-11-20)

- Median up 3.6% YoY; **same-home appreciation was +0.8%/yr**.
- Homes sold in a median **85 days**; **6% sold over list**; supply **4.4 months**.
- Largest county median changes (YoY): **Flagler +5.2%**, **Volusia +3.9%**; Volusia up 3.9%.
- **Momentum Market Score: 24/100 — Moderate buyer advantage.** Median +3.6% YoY.

Five biggest surprises

- **Same-home resales moved +0.8%/yr** while the median moved +3.6% year over year.
- **53% of active listings have cut their price** (as of 2026-11-20).
- **47% of listings leaving the market failed to sell** (384 expired, withdrawn or canceled vs 440 closed, all home types).
- **Owners who bought 5+ years ago have averaged +5.8%/yr**; those who bought in the last 1-3 years are at +0.8%/yr.
- **New construction was 9% of closings**.

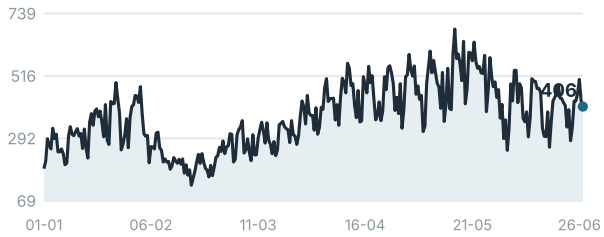
The market in eight charts

MEDIAN PRICE · 25 YEARS



$375,000 — +3.6% vs October 2025.

NEW CONTRACTS PER MONTH · LEADING INDICATOR



Counted by contract month once those deals have closed; shown through August 2026.

APPRECIATION — FOUR MEASURES



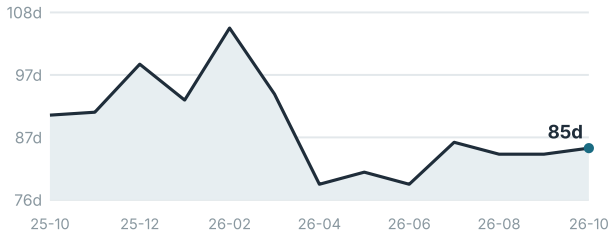
Same-home resales: **+0.8%/yr**; median: +4% YoY.

MEDIAN PRICE CHANGE BY COUNTY · YOY



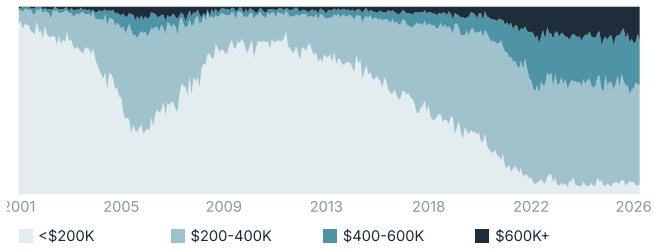
Volusia leads on volume; **Flagler** leads on growth.

DAYS ON MARKET · 12 MONTHS



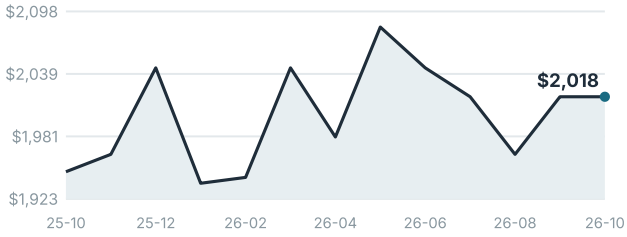
85 days — faster 6.1% than a year ago.

SHARE OF SALES BY PRICE TIER · 25 YEARS



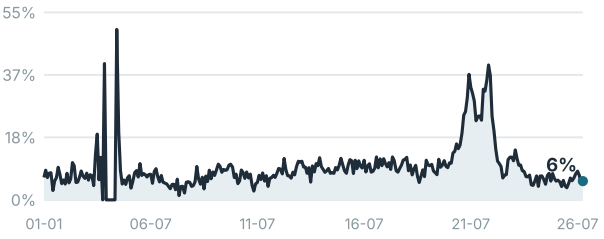
$600K+ is 18% of sales.

AFFORDABILITY · MONTHLY PAYMENT FOR THE MEDIAN HOME



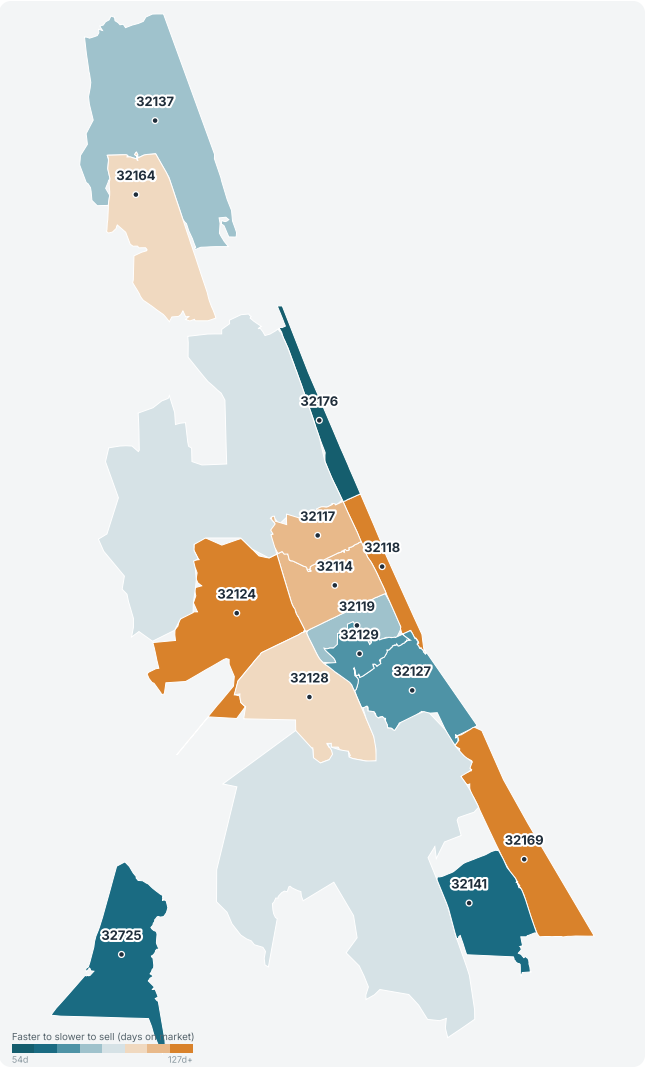
$2,018/mo at 7.11% (20% down, 30-yr), +3.6% YoY.

SHARE OF CLOSINGS OVER LIST PRICE · 25 YEARS



6% of October closings sold over the original asking price.

Neighborhood heat map (by ZIP)



WHERE HOMES SELL FASTEST · SINGLE-FAMILY, AUGUST 2026 TO OCTOBER 2026

Every ZIP in the Daytona Beach Area MLS footprint with 15+ single-family closings in the last three months, shaded by **days on market**: deep teal is fastest, amber slowest. Labels mark the ZIPs in the two tables. **Ormond Beach** ZIPs run hot; **Daytona Beach** is the slow end.

HOTTEST: FASTEST & MOST COMPETITIVE

ZIP · CITY	SALES	DOM	OVER	MEDIAN
32176 · Ormond Beach	70	54	1%	$429,500
32725 · Deltona	15	63	0%	$340,000
32141 · Edgewater	38	65	8%	$294,950
32127 · Port Orange	61	66	7%	$362,500
32129 · Port Orange	49	80	12%	$322,000
32137 · Palm Coast	58	80	5%	$385,415
32119 · South Daytona	43	81	7%	$290,000

COOLEST: SLOWEST TO SELL

ZIP · CITY	SALES	DOM	OVER	MEDIAN
32118 · Daytona Beach	42	127	10%	$372,500
32169 · New Smyrna Beach	17	112	0%	$795,000
32124 · Daytona Beach	92	100	1%	$443,750
32114 · Daytona Beach	33	100	6%	$238,500
32117 · Daytona Beach	50	98	16%	$232,500
32128 · Port Orange	79	89	6%	$460,000
32164 · Palm Coast	46	88	2%	$350,500

ZIP boundaries: U.S. Census ZCTA. Tables cover ZIPs with ≥15 single-family closings in the trailing three months.

Demand & the contract pipeline

Active-under-contract and pending are tracked **separately** — AUC deals are contingent and can fall through; pending have cleared contingencies. New contracts are counted by contract month once those deals have closed (shown through August 2026). **53% of active listings have cut their price** (as of 2026-11-20).

SINGLE-FAMILY PIPELINE, OCTOBER 2026

STAGE	COUNT	WHAT IT MEANS
Active (available)	1,604	Listed, not under contract
Active under contract	132	Contingent — still taking backups
Pending	452	Contingencies cleared — headed to closing
New under contract in October	n/a	Counted once those deals close
Months of supply	4.4	Active ÷ monthly closings — balanced

Listings failing to sell — over time

PULL RATE — % OF LISTINGS EXPIRED OR WITHDRAWN · BY YEAR

Share of listings leaving the market without closing.

In October, **384 listings expired, were withdrawn or canceled** against **440 closings** — a **47% pull rate**.

Median vs. "sold twice" — what's the difference?

The **median** just averages whatever happened to sell that month: if a wave of larger, higher-end homes closes, it jumps even if no single house gained. **Sold twice** finds the identical house that sold 1-3 years ago and again in the last 12 months and compares the two prices — since it is the same home both times, and the hold is short, that gap is comparable with the 12-month median change. This month: median +3.6% YoY vs same-home +0.8%/yr across 196 short-hold pairs. Owners who bought 5+ years ago have averaged +5.8%/yr (981 pairs).

Rates & affordability

The 30-year fixed is about **7.11%** (latest rate carried on our county pages), which puts the payment on the median single-family home at **$2,018/month** with 20% down, +3.6% from a year ago. Cash buyers were **34%** of October closings, 64% of condos.

Rate: the figure our county scorecards carry (Freddie Mac PMMS via the national data lane). Payment: principal and interest only, 20% down, 30-year fixed.

By the numbers — for buyers & sellers

If you're buying

- **53%** of active listings have cut their price (as of 2026-11-20).
- **6%** of closings sold over the original list price; median **85 days** on market.
- Median price per sq ft **$209** (+1.8% YoY).

If you're selling

- Closings received a median **94.4%** of the original list price.
- **4.4 months** of supply.
- **47%** of listings that left the market in October did not sell.

By property type

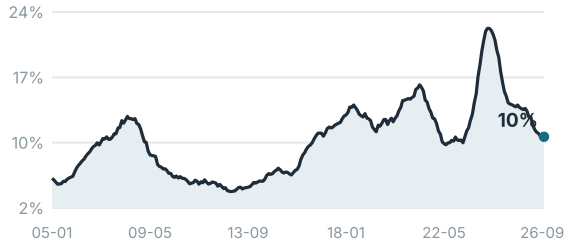
CLOSED SALES BY PROPERTY TYPE, OCTOBER 2026

TYPE	CLOSED	MEDIAN	YOY	$/SQ FT	DOM	CASH
Single-family	345	$375,000	+3.6%	$209	85	34%
Townhouse	27	$279,000	-1.4%	$169	97	44%
Condominium	80	$315,250	+6.9%	$243	92	64%

Condos: +6.9% YoY, 92 days on market, 64% cash. New construction was 9% of single-family closings.

New construction

NEW CONSTRUCTION · SHARE OF SINGLE-FAMILY SALES (12-MO ROLLING)



Now ~**10%** of single-family sales.

About **one in 11** single-family sales in October was a brand-new home.

County breakdown

SINGLE-FAMILY BY COUNTY — "YOY" = YEAR-OVER-YEAR CHANGE IN MEDIAN PRICE

COUNTY	CLOSED	MEDIAN	YOY	VS 2022 PEAK	DOM	CASH
Volusia	278	$370,000	+3.9%	-2.5%	84	33%
Flagler	49	$399,900	+5.2%	-19.1%	86	39%
Marion	5	$300,000	—	—	136	40%

Median-price YoY swings on low volume in small counties. "vs 2022 peak" compares this month's median to each county's highest 2022 month.

Price-band breakdown — sold, pending, active & new

All residential (single-family, condo & townhouse), Daytona Beach Area MLS region, computed from individual records. **Sold** is bucketed by closed price; **pending** counts listings still under contract by the month they went under contract (by list price); **active** and **new listings** are the current snapshot by list price.

SOLD LISTINGS — THIS MONTH & YEAR-TO-DATE

PRICE BAND	2026	2025	%CHG	YTD	YTD-1	%CHG
Under 100,000	6	7	-14.3%	107	117	-8.5%
100,000-119,999	9	9	0.0%	90	83	+8.4%
120,000-139,999	8	7	+14.3%	109	82	+32.9%
140,000-159,999	10	14	-28.6%	104	110	-5.5%
160,000-179,999	11	17	-35.3%	119	127	-6.3%
180,000-199,999	10	9	+11.1%	146	137	+6.6%
200,000-249,999	37	52	-28.8%	490	492	-0.4%
250,000-299,999	53	87	-39.1%	693	742	-6.6%
300,000-399,999	139	133	+4.5%	1450	1521	-4.7%
400,000-499,999	68	81	-16.0%	829	712	+16.4%
500,000-749,999	69	84	-17.9%	808	836	-3.3%
750,000-999,999	24	23	+4.3%	215	229	-6.1%
1,000,000+	18	18	0.0%	192	182	+5.5%
Totals	**462**	**541**	**-14.6%**	**5352**	**5370**	**-0.3%**

PENDING — CONTRACTS WRITTEN IN OCTOBER STILL OPEN

PRICE BAND	OCTOBER	SHARE
Under 100,000	0	0.0%
100,000-119,999	1	0.8%
120,000-139,999	1	0.8%
140,000-159,999	1	0.8%
160,000-179,999	8	6.4%
180,000-199,999	1	0.8%
200,000-249,999	13	10.4%
250,000-299,999	21	16.8%
300,000-399,999	34	27.2%
400,000-499,999	19	15.2%
500,000-749,999	15	12.0%
750,000-999,999	7	5.6%
1,000,000+	4	3.2%

ACTIVE LISTINGS — CURRENT FOR-SALE INVENTORY

PRICE BAND	COUNT	SHARE
Under 100,000	59	2.2%
100,000-119,999	56	2.0%
120,000-139,999	89	3.2%
140,000-159,999	74	2.7%
160,000-179,999	85	3.1%
180,000-199,999	97	3.5%
200,000-249,999	233	8.5%
250,000-299,999	313	11.4%
300,000-399,999	642	23.4%
400,000-499,999	350	12.8%
500,000-749,999	419	15.3%
750,000-999,999	156	5.7%
1,000,000+	170	6.2%

Snapshot as of 2026-11-20 — 2,743 active residential listings.

NEW LISTINGS — CAME ON MARKET IN OCTOBER (STILL LISTED)

PRICE BAND	COUNT	SHARE
Under 100,000	7	1.3%
100,000-119,999	11	2.0%
120,000-139,999	15	2.7%
140,000-159,999	12	2.2%
160,000-179,999	19	3.5%
180,000-199,999	17	3.1%
200,000-249,999	51	9.3%
250,000-299,999	69	12.6%
300,000-399,999	126	23.1%
400,000-499,999	67	12.3%
500,000-749,999	86	15.8%
750,000-999,999	39	7.1%
1,000,000+	27	4.9%

546 listings with a October on-market date still active at the snapshot.

The numbers — single-family reference

OCTOBER 2026 (DAYTONA BEACH AREA MLS REGION)

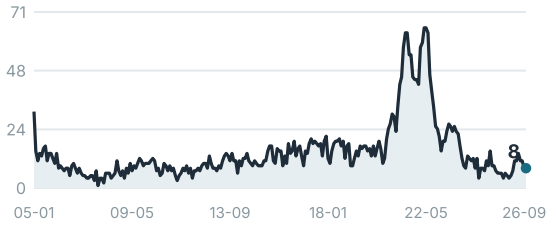
METRIC	OCTOBER 2026	VS. OCTOBER 2025	VS. SEPTEMBER 2026
Median sale price	$375,000	+3.6%	0.0%
Average sale price	$459,983	+6.8%	+5.5%
Closed sales	345	-16.3%	-10.2%
New contracts written	n/a	—	—
Median days on market	85	-6.1%	+1.2%
Median $/sq ft	$209	+1.8%	+0.7%
Received vs. original list	94.4%	+0.5%	-1.0%
Received vs. final list	97.4%	+0.4%	-0.3%
Closed over list price	5.5%	+41.5%	+11.6%
Cash share	34.2%	-6.7%	+1.0%

Single-family, Daytona Beach Area MLS region. Computed from 345 closed records, cleaned for entry errors. "New contracts" = closings by contract month, shown once three months of later closings are in. "Received vs. original list" vs the first asking price; the gap to final list is the pre-sale price cut.

Does the Score work? A 20-year back-test

We computed a closed-sales version of the **Momentum Market Score** every month back to 2005 (pace, over-list share and price-cut discipline), then measured what the median price actually did over the **next six months**. It bottomed at 1 in November 2007 and peaked at 65 in April 2022; today it reads 7.

MOMENTUM MARKET SCORE · 2005–2026



0 = deep buyer's market, 100 = frenzy.

WHAT HAPPENED NEXT · AVG 6-MO PRICE CHANGE BY SCORE TIER



Average median change over the next six months, by Score tier, 2005 on. Correlation **+0.29** across 257 monthly readings since 2005.

The live cover Score also blends months of supply and the active price-cut share, so the two differ slightly. Past performance is not a guarantee of future results.

Momentum Forecast · next six months

Probability-weighted directional readings from this edition's leading indicators — active price cuts (53%), days on market (-6.1% YoY) and months of supply (4.4). The weights follow a fixed rule: an indicator moving strongly in one direction (10%+ YoY) is given 65/25/10; a moderate move 55/30/15; a weak or absent move 45/35/20. Each row sums to 100%.

Median price
HEADLINE, YOY



• **55%** Up 2-5% • **30%** Flat • **15%** Down 2%+

Days on market
MARKET PACE



• **55%** Shortening • **30%** Flat • **15%** Reverses

Active price cuts
SHARE OF LISTINGS



• **60%** Stays elevated • **30%** Holds flat • **10%** Falls back

• Most likely • Alternative • Tail risk Directional model for discussion — not investment advice.

Methodology & the Momentum Market Pulse™

The **Momentum Market Pulse™** is an independent monthly research product. All market figures are computed by Momentum Realty directly from individual Daytona Beach Area MLS closed records (not a third-party dashboard), for single-family homes in the Volusia and Flagler counties region unless noted, cleaned for data-entry errors and de-duplicated by listing ID. Medians throughout. "Same-home appreciation" matches repeat sales of the same parcel across the 25-year archive: second sale in the trailing 12 months, first sale 1-3 years earlier so the figure is comparable with a 12-month median change (median annualized change); owners who bought 5+ years ago are reported separately. "Constant-mix" reweights this month's price-tier medians by last year's tier shares. "New contracts" count closings by contract month (estimated from on-market date plus days on market where the feed omits the contract date); a month is published once three months of later closings are in, and a metric whose inputs are incomplete or fail a plausibility check is left out rather than estimated; inventory stages are point-in-time as of the pull. "Failed to sell" counts listings that left the market expired, withdrawn or canceled against those that closed. The **Market Score** (0-100) equally weights months of supply, days on market, the share selling over list, and the share of active listings cutting price. Late-reported closings keep arriving for several weeks; the edition is refreshed in place. Aggregates only; no individual listing is identified. © 2026 Daytona Beach Area Association of REALTORS®, Inc. Momentum Realty is a licensed Florida and Georgia brokerage; this report is market information, not an appraisal or investment advice. © 2026 Move With Momentum LLC · movewithmomentum.com · (904) 351-6461.

EVERY MARKET, EVERY MONTH

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