MOMENTUM REALTY

MOMENTUM MARKET PULSE™
INDEPENDENT HOUSING RESEARCH

SPACE COAST · MONTHLY REPORT

October 2026 *Market Pulse*



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Space Coast MLS · October 2026
Computed from closed records through 2026-11-19

MEDIAN SOLD · SF
$370,950 +3.0%

monthly median

SAME-HOME APPRECIATION
+2.0% /yr

same home, bought 1-3 yrs ago

DAYS ON MARKET
37 -21.3%

list → close, median

NEW CONTRACTS (OCTOBER)
n/a

counted once deals close

MONTHS OF SUPPLY
3.4 SF
seller-leaning

SOLD OVER LIST
9% +18.3%

buyer competition



Balanced, soft

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 +3.0% year over year. Down 2 points from September (51, Balanced, firm).

Supply **72** Speed **71** Over-list **30** Price cuts **22**



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Space Coast MLS data · closings through 2026-11-19

Executive summary

THE SIGNATURE FINDING

704 closings (-17.8% YoY), median $370,950 (+3.0% YoY).

The median was $370,950 (+3.0% YoY) and $/sq ft +2.2%; same-home resales +2.0% a year. Closings -17.8% YoY.

$370,950
Median price — **+3.0% YoY**

704
Single-family closings in October — **-17.8% vs a year ago**

49%
Of **current active listings** have cut their price (point-in-time, as of 2026-11-20)

- Median up 3.0% YoY; **same-home appreciation was +2.0%/yr**.
- Homes sold in a median **37 days**; **9% sold over list**; supply **3.4 months**.
- Largest county median changes (YoY): **Brevard +3.6%**, **Indian River -1.1%**; Indian River down 1.1%.
- **Momentum Market Score: 49/100 — Balanced, soft.** Median +3.0% YoY.

Five biggest surprises

- **49% of active listings have cut their price** (as of 2026-11-20).
- **36% of listings leaving the market failed to sell** (462 expired, withdrawn or canceled vs 819 closed, all home types).
- **Owners who bought 5+ years ago have averaged +6.4%/yr**; those who bought in the last 1-3 years are at +2.0%/yr.
- **New construction was 15% of closings**.

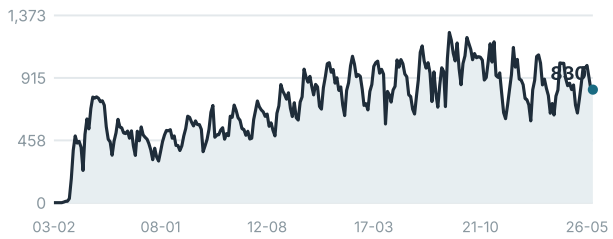
The market in eight charts

MEDIAN PRICE · 25 YEARS



$370,950 — +3.0% 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



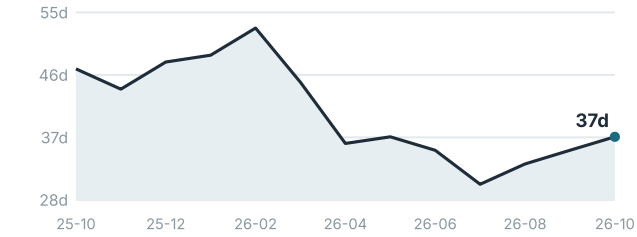
Same-home resales: **+2.0%/yr**; median: +3% YoY.

MEDIAN PRICE CHANGE BY COUNTY · YOY



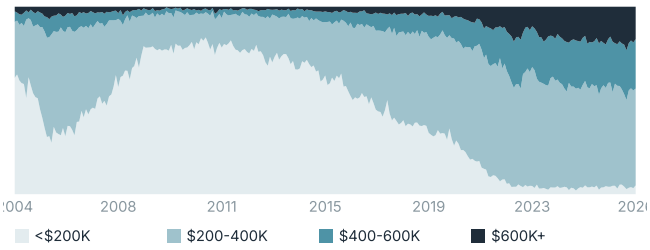
Brevard leads on volume; **Brevard** leads on growth.

DAYS ON MARKET · 12 MONTHS



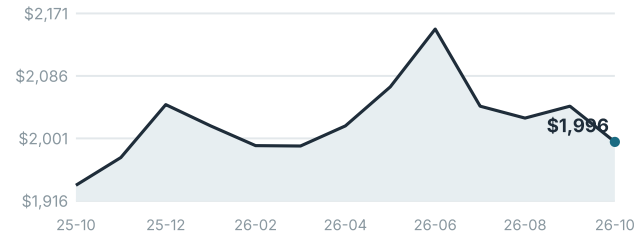
37 days — faster 21.3% than a year ago.

SHARE OF SALES BY PRICE TIER · 25 YEARS



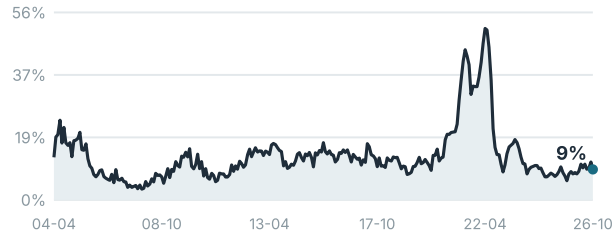
$600K+ is 17% of sales.

AFFORDABILITY · MONTHLY PAYMENT FOR THE MEDIAN HOME



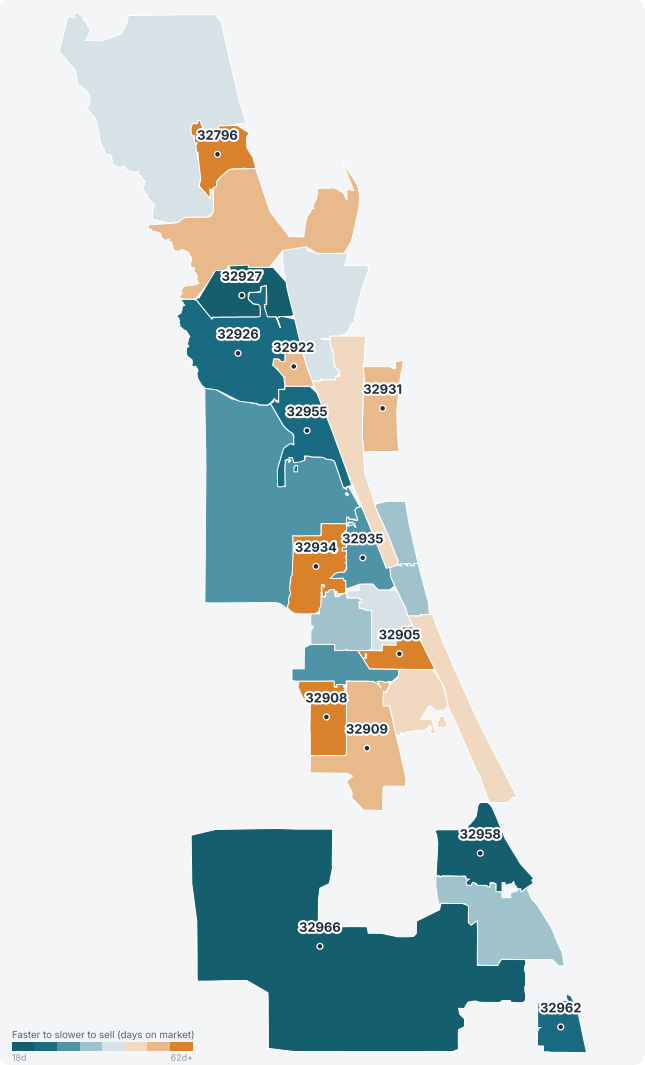
$1,996/mo at 7.11% (20% down, 30-yr), +3.0% YoY.

SHARE OF CLOSINGS OVER LIST PRICE · 25 YEARS



9% 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 Space Coast 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. **Vero Beach** ZIPs run hot; **Palm Bay** is the slow end.

HOTTEST: FASTEST & MOST COMPETITIVE

ZIP · CITY	SALES	DOM	OVER	MEDIAN
32966 · Vero Beach	16	18	6%	$373,750
32927 · Cocoa	99	20	12%	$325,000
32958 · Sebastian	69	21	10%	$365,000
32926 · Cocoa	63	25	8%	$400,000
32962 · Vero Beach	22	25	14%	$275,000
32955 · Rockledge	119	27	12%	$434,027
32935 · Melbourne	93	28	12%	$295,000

COOLEST: SLOWEST TO SELL

ZIP · CITY	SALES	DOM	OVER	MEDIAN
32908 · Palm Bay	144	62	9%	$322,245
32796 · Titusville	68	54	10%	$305,750
32934 · Melbourne	49	51	10%	$523,000
32905 · Palm Bay	58	50	7%	$318,750
32909 · Palm Bay	255	45	9%	$344,000
32931 · Cocoa Beach	19	44	26%	$760,000
32922 · Cocoa	33	40	19%	$199,000

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). **49% of active listings have cut their price** (as of 2026-11-20).

SINGLE-FAMILY PIPELINE, OCTOBER 2026

STAGE	COUNT	WHAT IT MEANS
Active (available)	2,459	Listed, not under contract
Active under contract	408	Contingent — still taking backups
Pending	732	Contingencies cleared — headed to closing
New under contract in October	n/a	Counted once those deals close
Months of supply	3.4	Active ÷ monthly closings — seller-leaning

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, **462 listings expired, were withdrawn or canceled** against **819 closings** — a **36% 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 +3.0% YoY vs same-home +2.0%/yr across 619 short-hold pairs. Owners who bought 5+ years ago have averaged +6.4%/yr (2,483 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 **$1,996/month** with 20% down, +3.0% from a year ago. Cash buyers were **23%** of October closings, 61% 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

- **49%** of active listings have cut their price (as of 2026-11-20).
- **9%** of closings sold over the original list price; median **37 days** on market.
- Median price per sq ft **$213** (+2.2% YoY).

If you're selling

- Closings received a median **96.3%** of the original list price.
- **3.4 months** of supply.
- **36%** of listings that left the market in October did not sell.

By property type

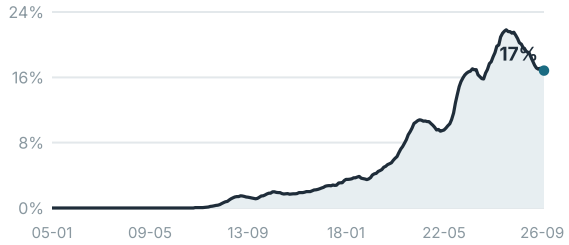
CLOSED SALES BY PROPERTY TYPE, OCTOBER 2026

TYPE	CLOSED	MEDIAN	YOY	$/SQ FT	DOM	CASH
Single-family	704	$370,950	+3.0%	$213	37	23%
Townhouse	55	$280,000	-17.0%	$192	56	22%
Condominium	119	$285,000	+19.7%	$217	56	61%

Condos: +19.7% YoY, 56 days on market, 61% cash. New construction was 15% of single-family closings.

New construction

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



Now ~**17%** of single-family sales.

About **one in 7** 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
Brevard	621	$370,000	+3.6%	-1.3%	39	21%
Indian River	61	$365,000	-1.1%	-9.9%	30	34%
Volusia	7	$434,900	+31.4%	+9.4%	22	43%
St. Lucie	6	$419,500	+52.5%	—	43	50%

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), Space Coast 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	15	16	-6.2%	180	154	+16.9%
100,000-119,999	16	14	+14.3%	139	114	+21.9%
120,000-139,999	12	26	-53.8%	181	206	-12.1%
140,000-159,999	29	27	+7.4%	272	262	+3.8%
160,000-179,999	18	36	-50.0%	286	295	-3.1%
180,000-199,999	27	27	0.0%	294	318	-7.5%
200,000-249,999	70	90	-22.2%	845	873	-3.2%
250,000-299,999	114	141	-19.1%	1327	1421	-6.6%
300,000-399,999	258	314	-17.8%	3228	3345	-3.5%
400,000-499,999	138	150	-8.0%	1546	1555	-0.6%
500,000-749,999	156	153	+2.0%	1770	1722	+2.8%
750,000-999,999	31	54	-42.6%	566	602	-6.0%
1,000,000+	36	45	-20.0%	431	436	-1.1%
Totals	**920**	**1093**	**-15.8%**	**11065**	**11303**	**-2.1%**

PENDING — CONTRACTS WRITTEN IN OCTOBER STILL OPEN

PRICE BAND	OCTOBER	SHARE
Under 100,000	0	0.0%
100,000-119,999	3	1.6%
120,000-139,999	1	0.5%
140,000-159,999	1	0.5%
160,000-179,999	0	0.0%
180,000-199,999	1	0.5%
200,000-249,999	7	3.7%
250,000-299,999	24	12.8%
300,000-399,999	72	38.3%
400,000-499,999	36	19.1%
500,000-749,999	27	14.4%
750,000-999,999	7	3.7%
1,000,000+	9	4.8%

ACTIVE LISTINGS — CURRENT FOR-SALE INVENTORY

PRICE BAND	COUNT	SHARE
Under 100,000	36	1.0%
100,000-119,999	43	1.2%
120,000-139,999	66	1.8%
140,000-159,999	80	2.2%
160,000-179,999	122	3.3%
180,000-199,999	105	2.9%
200,000-249,999	263	7.2%
250,000-299,999	431	11.8%
300,000-399,999	1088	29.8%
400,000-499,999	505	13.8%
500,000-749,999	480	13.2%
750,000-999,999	204	5.6%
1,000,000+	225	6.2%

Snapshot as of 2026-11-20 — 3,648 active residential listings.

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

PRICE BAND	COUNT	SHARE
Under 100,000	10	1.1%
100,000-119,999	14	1.6%
120,000-139,999	13	1.5%
140,000-159,999	16	1.8%
160,000-179,999	28	3.2%
180,000-199,999	26	3.0%
200,000-249,999	61	7.0%
250,000-299,999	109	12.5%
300,000-399,999	274	31.3%
400,000-499,999	120	13.7%
500,000-749,999	121	13.8%
750,000-999,999	51	5.8%
1,000,000+	32	3.7%

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

The numbers — single-family reference

OCTOBER 2026 (SPACE COAST MLS REGION)

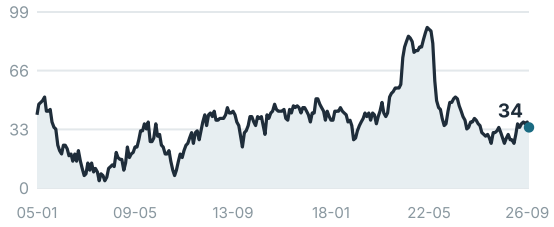
METRIC	OCTOBER 2026	VS. OCTOBER 2025	VS. SEPTEMBER 2026
Median sale price	$370,950	+3.0%	-2.4%
Average sale price	$466,605	+1.2%	-1.9%
Closed sales	704	-17.8%	-15.4%
New contracts written	n/a	—	—
Median days on market	37	-21.3%	+5.7%
Median $/sq ft	$213	+2.2%	-1.1%
Received vs. original list	96.3%	+1.2%	-0.3%
Received vs. final list	98.4%	+0.2%	0.0%
Closed over list price	9.1%	+18.3%	-19.5%
Cash share	23.3%	-6.4%	-0.1%

Single-family, Space Coast MLS region. Computed from 704 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

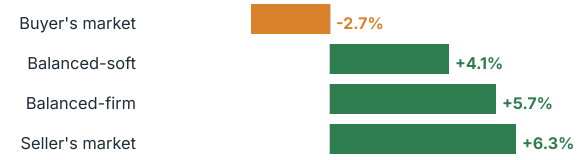
We computed a closed-sales version of the **Momentum Market Score** every month back to 2005 (pace, over-list share and price-cut discipline), then measured what the median price actually did over the **next six months**. It bottomed at 4 in October 2007 and peaked at 90 in April 2022; today it reads 33.

MOMENTUM MARKET SCORE · 2005–2026



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

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

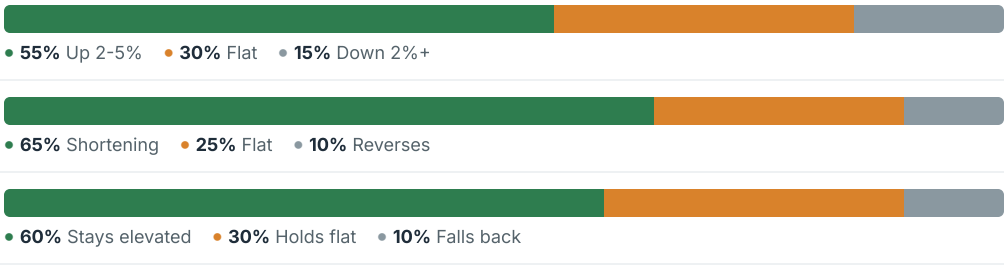


Average median change over the next six months, by Score tier, 2005 on. Correlation **+0.44** across 257 monthly readings since 2005.

In seller-market months (Score 67+), the median rose +6.3% over the next six months on average; in buyer-market months (0-33) it moved -2.7%. 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 (49%), days on market (-21.3% YoY) and months of supply (3.4). 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%.



• 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 Space Coast MLS closed records (not a third-party dashboard), for single-family homes in the Brevard County 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. Listing data provided by the Space Coast Multiple Listing Service. Information is deemed reliable but is not guaranteed by the MLS to be accurate. 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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