

September 2025

Pinehurst Area Monthly Market Report

Single Family Residences in Moore County



Provided By ChartMaster Services, LLC
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Data



ABOUT THIS REPORT

- Producing timely reports means that transactions must be downloaded and analyzed before all have been entered into the MLS system. As a result, the transaction data and measurements in this report will increase when all have been entered. Since this is true in every report period these differences have always existed. When the next report is produced all closings from the previous period will have been entered and therefore the measurements will have changed to reflect more complete data. Transactions are often entered as much as 45 days after the end of a month, making it difficult to produce timely reporting without excluding some transactions.
- ChartMaster statistics include Days on Market (DOM) and Original Listing Prices (OLP) for previous listing periods of unclosed listings even when the property was off the market for more than 30 days between listings. Normally, MLS data does not include those stats when a listing is Withdrawn or Expired and re-listed after a lapse of 30 days or more or is re-listed with a different company. Therefore, the median DOM and % S/OLP could be understated by not including all the information for all listing periods for a given property. As a result, our data attempts to include all relevant listing data.





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Pinehurst / Moore County in September

Price Range	New Listings	Active Listings	Under Contract	Pending Ratio	Closed Sales	Median Sales Price	Median S/OLP%	Median DOM	Months of Supply	Sold Above List Price	Price Reduced	Not PR Median S/OLP%	PR Median S/OLP%	Not PR DOM	PR DOM	EXP/CANC (Failed)
<\$150K	1	14	1	6.7%	1	\$170,000	114.9%	7	14.0	100.0%	0.0%	114.9%		7		0.0%
\$150K-<\$200K	4	8	2	20.0%	4	\$188,750	96.4%	83	2.0	0.0%	50.0%	96.4%	82.6%	54	175	20.0%
\$200K-<\$250K	4	16	6	27.3%	5	\$218,900	95.4%	18	3.2	20.0%	20.0%	93.1%	95.4%	14	102	37.5%
\$250K-<\$300K	6	34	14	29.2%	11	\$280,000	96.7%	112	3.1	27.3%	63.6%	100.0%	90.4%	10	129	8.3%
\$300K-<\$350K	16	33	17	34.0%	19	\$325,000	92.4%	48	1.7	31.6%	52.6%	100.0%	84.6%	19	199	13.6%
\$350K-<\$400K	37	104	47	31.1%	27	\$372,000	95.9%	46	3.9	25.9%	44.4%	99.7%	92.1%	22	102	18.2%
\$400K-<\$450K	33	102	38	27.1%	18	\$418,250	99.1%	34	5.7	44.4%	44.4%	100.0%	94.9%	19	94	21.7%
\$450K-<\$500K	30	83	30	26.5%	26	\$462,495	97.2%	60	3.2	38.5%	50.0%	100.0%	90.5%	8	111	13.3%
\$500K-<\$550K	18	48	18	27.3%	12	\$525,000	97.5%	35	4.0	41.7%	41.7%	100.0%	95.7%	22	59	25.0%
\$550K-<\$600K	13	44	19	30.2%	13	\$550,000	90.8%	92	3.4	7.7%	69.2%	99.5%	87.5%	22	120	27.8%
\$600K-<\$650K	8	21	9	30.0%	10	\$605,500	98.2%	18	2.1	40.0%	30.0%	100.0%	95.5%	5	72	23.1%
\$650K-<\$700K	10	29	14	32.6%	3	\$650,000	100.0%	4	9.7	100.0%	0.0%	100.0%		4		40.0%
\$700K-<\$800K	12	40	16	28.6%	4	\$716,000	97.7%	46	10.0	25.0%	50.0%	99.5%	93.1%	19	110	33.3%
\$800K-<\$1M	11	44	14	24.1%	10	\$857,500	96.7%	71	4.4	30.0%	50.0%	100.0%	93.4%	18	129	23.1%
\$1M-<\$1.5M	15	45	25	35.7%	6	\$1,222,500	96.4%	21	7.5	16.7%	33.3%	98.8%	89.2%	13	136	33.3%
\$1.5M-<\$2M	6	20	5	20.0%	0											100.0%
\$2M+	3	20	6	23.1%	0											100.0%
TOTAL	227	705	281	28.5%	169	\$437,000	96.7%	46	4.2	32.0%	46.7%	100.0%	91.3%	15	111	21.8%

New Listings = Listings taken during the month regardless of current status.
Active Listings = Total number of available listings at the end of the month.
Under Contract = Total number of listings in Pending / Under contract Status at the end of the month.
Pending Ratio = Pending Listings ÷ (Active Listings + Pending Listings)
Closed Sales = Total number of closed listings during the month.
Median Sales Price = Half were lower and half were higher, the middle.
S/OLP = Ratio of Sold Price ÷ Original List Price (Gross to Seller)
(DOM) Days on Market = Number of days from Listing Date to Pending Date.

Seller's Market
0-6 Months

Balanced Market
6-7 Months

Buyer's Market
7+ Months

Months of Supply = How long it would take to sell all Active Listings if no new Listings were put on the market.

% Sold Above List Price = The percentage of closed sales which sold at 100% or more of the asking price.

% Price Reduced (PR) = The percentage of closed sales that required a price reduction prior to going under contract.

EXP/CANC = The percentage of Finalized Listings (Closed+EXP+CANC) that Expired or were Cancelled (Failed) during the month.



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Pinehurst / Moore County

	August 2025	September 2025	M-O-M % Change		September 2024	September 2025	Y-O-Y % Change
New Listings	219	227	3.7% ▲	New Listings	152	227	49.3% ▲
Active	663	705	6.3% ▲	Active	529	705	33.3% ▲
Pending	286	281	1.7% ▼	Pending	363	281	22.6% ▼
Pending Ratio	30.1%	28.5%	1.6% ▼	Pending Ratio	40.7%	28.5%	12.2% ▼
Closed	170	169	0.6% ▼	Closed	140	169	20.7% ▲
Supply in Months	3.9	4.2	7.7% ▲	Supply in Months	3.8	4.2	10.5% ▲
Med. Sale Price	\$421,409	\$437,000	3.7% ▲	Med. Sale Price	\$450,250	\$437,000	2.9% ▼
Med. % Sale/OLP	97.2%	96.7%	0.5% ▼	Med. % Sale/OLP	97.8%	96.7%	1.1% ▼
Med. DOM	43	46	7.0% ▲	Med. DOM	39	46	19.5% ▲
Sold Above List Price	31.2%	32.0%	0.8% ▲	Sold Above List Price	35.7%	32.0%	3.7% ▼
Price Reduced (PR)	39.4%	46.7%	7.3% ▲	Price Reduced (PR)	32.9%	46.7%	13.8% ▲
Reduction Amount	-5.9%	-6.5%	0.6% ▲	Reduction Amount	-4.5%	-6.5%	2.0% ▲
NOT PR % S/OLP	100.0%	100.0%	0.0%	NOT PR % S/OLP	100.0%	100.0%	0.0%
PR % S/OLP	93.0%	91.3%	1.7% ▼	PR % S/OLP	94.2%	91.3%	2.9% ▼
NOT PR Median DOM	15	15	0.0%	NOT PR Median DOM	16	15	6.3% ▼
PR Median DOM	101	111	9.9% ▲	PR Median DOM	106	111	4.7% ▲
% Failed	20.9%	21.8%	0.9% ▲	% Failed	16.2%	21.8%	5.6% ▲
% Distressed	0.0%	0.6%	0.6% ▲	% Distressed	0.0%	0.6%	0.6% ▲



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Perspective

Considering most of the charts and pages in this report compare the current month to last month or last year, it's important to understand that **the last five to six years are** being considered by most experts, including Gary Keller, to be **"outliers"** in the historical market picture. Therefore, comparing the current month with a more normal market in **2019 brings a better perspective** to the current state of the market.

Measurement	"Normal" Market (Month of September 2019)	Current Market (Month of September 2025)	Effect
Active Listings	866	705	Fewer Choices = Less Seller Competition
Pending Listings	433	281	Fewer Pending Sales = Cooler Market
# Sold	150	169	More Activity = Higher Overall Demand
Supply in Months	5.8	4.2	Less Supply = More Buyer Competition
Median Sales Price	\$275,367	\$437,000	Higher Selling Prices = More Pressure on Financing
Median DOM	47	46	Similar Sales Cycle
Median % S/OLP Price	97.0%	96.7%	Similar Negotiation = Similar Seller Competition
% Price Reductions	33.3%	46.7%	More Price Reductions = Higher Seller Pricing Pressure
% Failed Listings	19.4%	21.8%	More Failed Listings = Higher Market Resistance



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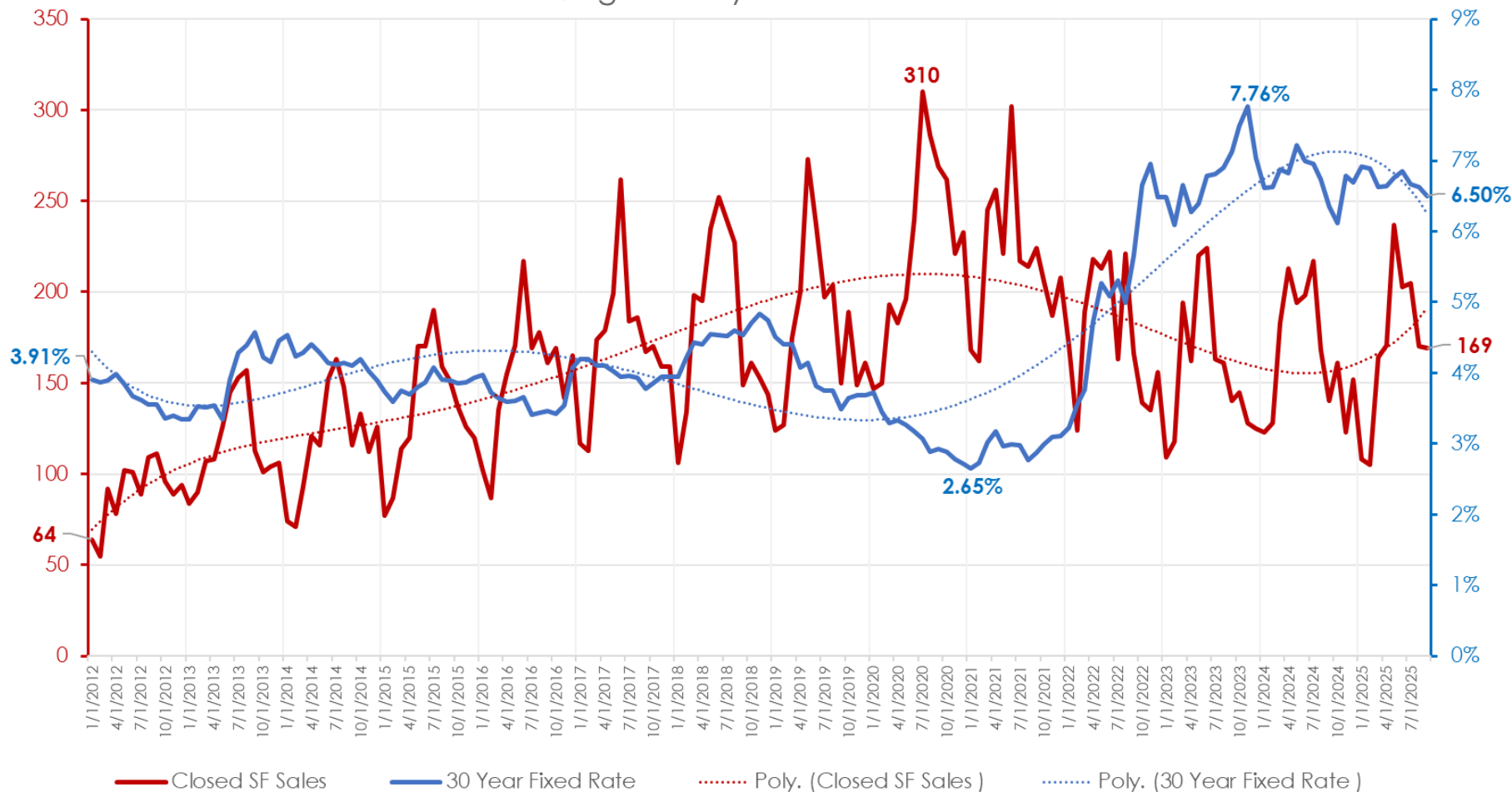
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Pinehurst / Moore County Home Sales vs. Mortgage Rates

Single Family Residences





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A one year trend **guides our understanding of market seasonality** and general direction of key metrics.
It also helps answer the age old questions, **"When's the best time to put my house on the market?"**
and **"Is now a good time to buy?"**.

Pinehurst / Moore County - 1 Year Trend

Y.O.Y Count,
\$ Amount or
Points of
Change

Report Date	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25	TREND	
New Listings	152	151	145	105	153	191	263	298	247	203	239	219	227		75 ▲
Active	529	542	548	554	561	573	586	603	627	622	661	663	705		176 ▲
Pending	363	355	327	236	358	384	508	508	342	323	285	286	281		82 ▼
Pending Ratio	40.7%	39.6%	37.4%	29.9%	39.0%	40.1%	46.4%	45.7%	35.3%	34.2%	30.1%	30.1%	28.5%		12.2% ▼
Closed	140	161	123	152	108	106	164	171	237	203	205	170	169		29 ▲
Supply in Months	3.8	3.4	4.5	3.6	5.2	5.4	3.6	3.5	2.6	3.1	3.2	3.9	4.2		.4 ▲
Med. Sale Price	\$450,250	\$465,000	\$493,500	\$412,500	\$441,000	\$400,000	\$439,950	\$450,000	\$442,676	\$450,000	\$465,000	\$421,409	\$437,000		\$13,250 ▼
Med. % Sale/OLP	97.8%	97.9%	97.6%	96.9%	97.0%	96.6%	96.6%	99.1%	98.3%	97.6%	98.4%	97.2%	96.7%		1.1% ▼
Med. DOM	39	34	65	35	62	85	83	26	41	27	42	43	46		8 ▲
Sold Above List Price	35.7%	38.5%	35.8%	32.9%	28.7%	29.2%	22.6%	46.8%	39.2%	36.5%	36.6%	31.2%	32.0%		3.7% ▼
Price Reduced (PR)	32.9%	38.5%	42.3%	42.1%	48.1%	48.1%	46.3%	32.2%	34.2%	35.0%	37.6%	39.4%	46.7%		13.8% ▲
Reduction Amount	-4.5%	-3.6%	-5.4%	-4.7%	-6.1%	-6.8%	-7.4%	-4.3%	-4.0%	-5.3%	-4.3%	-5.9%	-6.5%		2.0% ▼
NOT PR % S/OLP	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	98.9%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%		0.0%
PR % S/OLP	94.2%	93.6%	93.1%	92.8%	91.5%	91.9%	90.2%	92.7%	94.3%	92.0%	93.9%	93.0%	91.3%		2.9% ▼
NOT PR Median DOM	16	16	19	17	22	21	15	11	16	13	17	15	15		1 ▼
PR Median DOM	106	80	113	127	126	178	178	141	156	85	100	101	111		5 ▲
% Failed	16.2%	17.4%	24.5%	17.4%	31.2%	19.7%	19.6%	17.4%	9.5%	14.0%	15.6%	20.9%	21.8%		5.6% ▲
% Distressed	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.5%	0.0%	0.0%	0.6%		0.6% ▲



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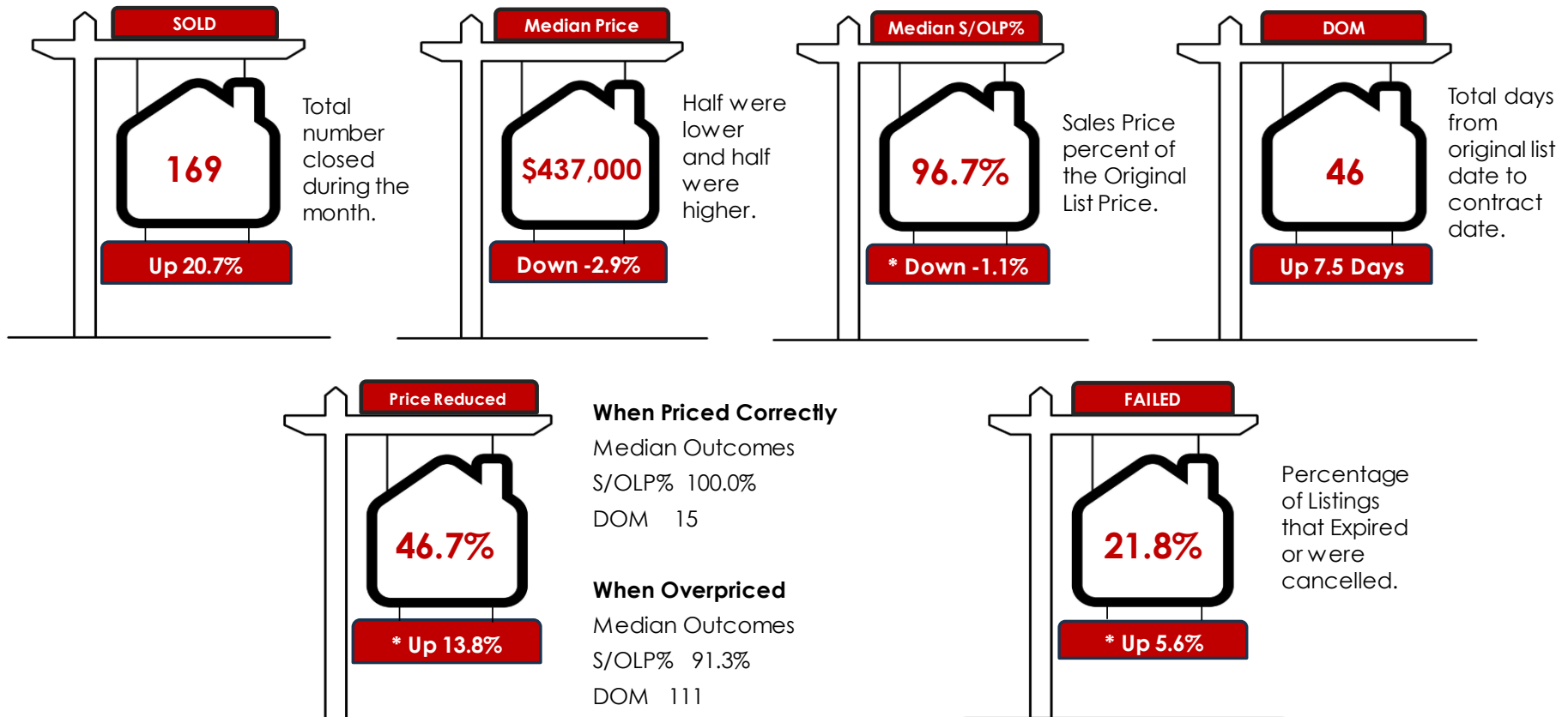
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Key Metrics Talking Points

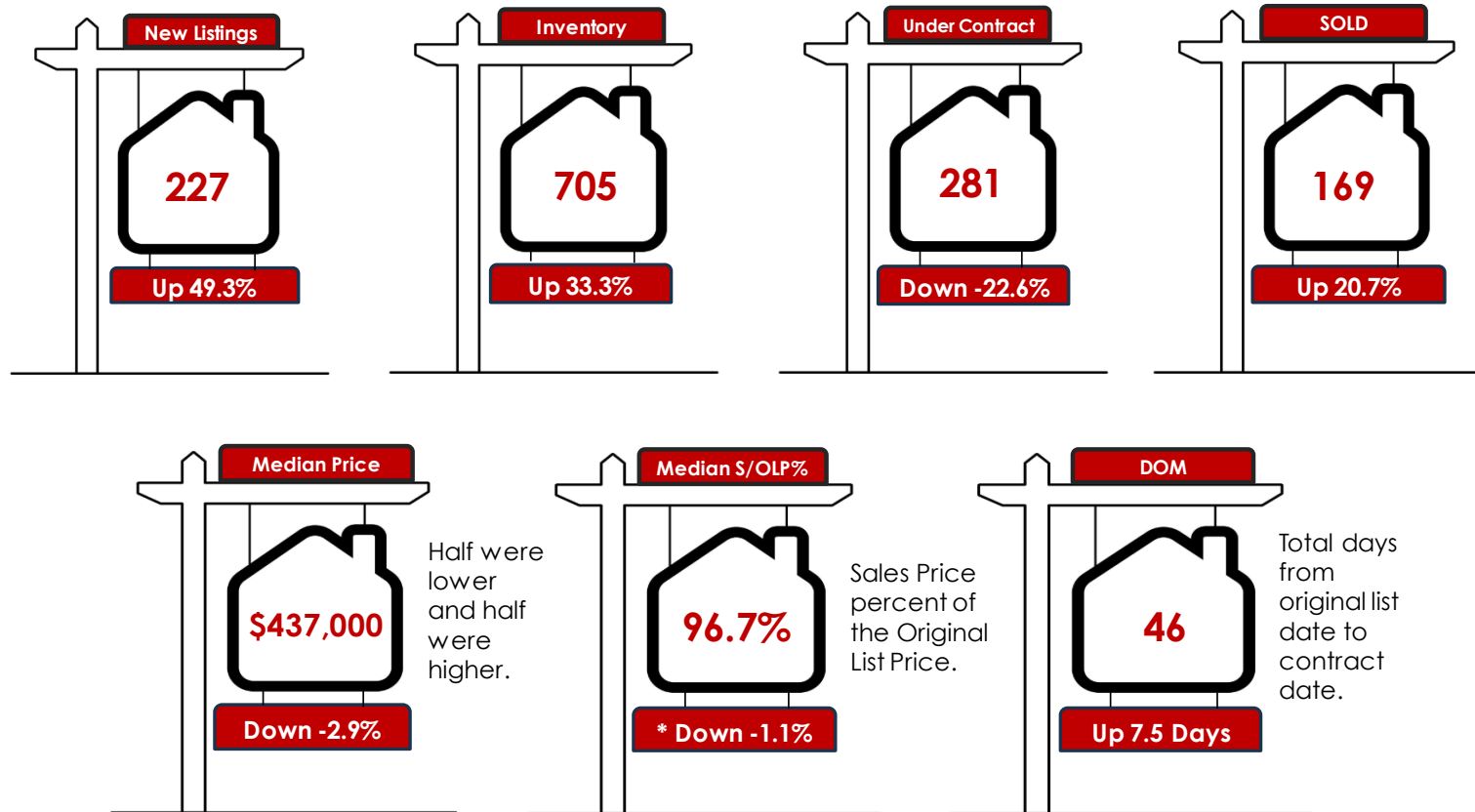
Key Metrics	September 2024	September 2025	Change	Remarks
# New Listings	152	227	49.3% ▲	More New Listings Came on the Market vs. last year
# Active	529	705	33.3% ▲	More Inventory for Buyers to Select from vs. last year
# Pending	363	281	22.6% ▼	Fewer Listings Going Under Contract vs. last year
# Closed	140	169	20.7% ▲	More Closed Sales vs. last year
Supply in Months	3.8	4.2	.4 ▲	More Supply and Seller Competiton vs. last year
Med. Sale Price	\$450,250	\$437,000	2.9% ▼	Lower Median Sales Price vs. last year
Med. % Sale/Orig. LP	97.8%	96.7%	1.1% ▼	More Sales Price Negotiations vs. last year
Med. DOM	39	46	8 ▲	More Time on the Market vs. last year
% Sold Above List Price	35.7%	32.0%	3.7% ▼	Fewer Multiple Offer Situations vs. last year
% Price Reduced (PR)	32.9%	46.7%	13.8% ▲	More Buyer Price Resistance vs. last year
Price Reduction Amount	-4.5%	-6.5%	2.0% ▲	Larger Price Reduction Amount vs. last year
NOT PR % S/OLP	100.0%	100.0%	0.0%	Negotiations Strongly Favor the Seller if Priced Correctly
PR % S/OLP	94.2%	91.3%	2.9% ▼	Negotiations Favor the Buyer when Overpriced
NOT PR Median DOM	16	15	1 ▼	Sales Cycle Favors the Seller when Priced Correctly
PR Median DOM	106	111	5 ▲	Sales Cycle Favors a Savvy Buyer when Overpriced
% Failed	16.2%	21.8%	5.6% ▲	Higher Seller Failure Rate vs. last year
% Distressed	0.0%	0.6%	0.6% ▲	More Foreclosures and Short Sales vs. last year

Pinehurst / Moore County in September 2025 vs. September 2024



* Percentage Points of Change

Pinehurst / Moore County in September 2025 vs. September 2024



* Percentage Points of Change



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Putting it All Together

Pinehurst / Moore County

For Every 100 Finalized Listings in September

22 FAILED
(Likely due to overpricing)

78 SOLD

36 Price Reduction Before Sold (47%)

S/OLP% 91.3%

DOM 111

**22 + 36 = 58 of every 100 listings:
OVERPRICED**

**42 No Price Reduction (53%):
CORRECTLY PRICED**

S/OLP% 100.0%

DOM 15

Finalized Listings = Listings that either Closed, Expired or were Cancelled during the month.

Price Reduced = The number and percentage of sellers who had to reduce their asking price prior to receiving an offer.

Failed = Listings that either Expired or were Cancelled during the month.

S/OLP% = The Sale Price as a percentage of the Original List Price at the time the listing was taken.

DOM = Days on Market - Number of days from the listing date to an accepted offer and contract.



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ABOUT THIS REPORT

Data

- The source of all data contained herein is MLS listings data for real estate transactions occurring in Selected Counties and does not necessarily represent all market activity for those Counties.
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