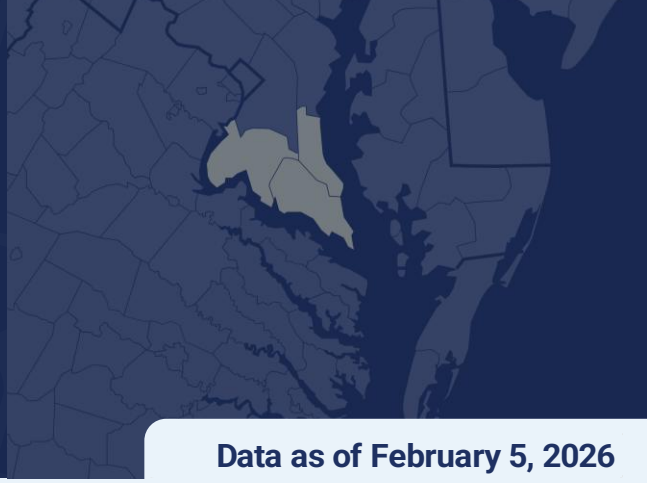
Southern Maryland

January 2026 Housing Market Report

Prepared by Bright Research



Data as of February 5, 2026

Key Market Statistics	Jan 2026	Jan 2025	Change	YTD 2026	YTD 2025	Change
Closed Sales	245	292	-16.1%	245	292	-16.1%
Median Sold Price	$422,500	$427,600	-1.2%	$422,500	$427,600	-1.2%
Median Days on Market	34 days	25 days	+9 days	34 days	25 days	+9 days
New Pending Sales	396	358	+10.6%	396	358	+10.6%
New Listings	385	342	+12.6%	385	342	+12.6%
Active Listings	820	648	+26.5%	820	648	+26.5%
Months of Supply	2.03	1.56	+0.47 mos.	2.03	1.56	+0.47 mos.
Showings	6,091	5,701	+6.8%	6,091	5,701	+6.8%

Housing Market Trends

Fewer closings in January but buyers and sellers are active in Southern Maryland. Southern Maryland had fewer closed sales in January 2026 than January 2025, with closed sales down in all three counties in the region.

However, new pending sales and new listings expanded during the first month of the year. New pending sales increased 10.6% year-over-year, with gains in all counties. New listings also were higher in January 2026, increasing 12.6%. Again, all three counties in Southern Maryland had more sellers.

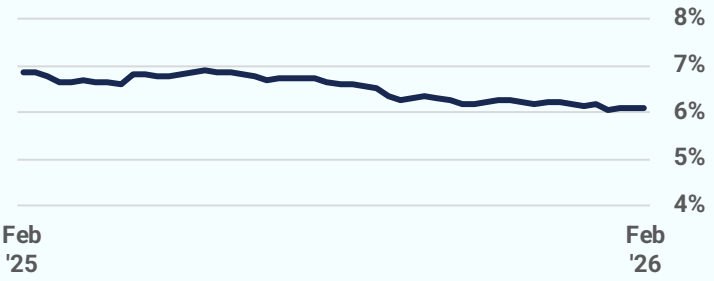
Active listings were 26.5% higher at the end of January compared to a year ago. More inventory has created more balance in the market. The overall median price dropped in January 2026, down 1.2%, though both Charles and Saint Mary's counties reported higher median prices.

The median days on market was also higher than a year ago, nine days slower than January 2025, but more aligned with January 2023.

Market Outlook

Southern Maryland had fewer closed sales in 2025 than 2024 and January started off sluggish, yet the outlook suggests more activity in 2026. Sales will still be held back by market headwinds yet more options and lower mortgage rates should encourage buyers. The market is adjusting as more inventory comes online and buyers and sellers may need to realign.

Weekly Avg. Mortgage Rate 30-yr fixed rate



Source: Freddie Mac

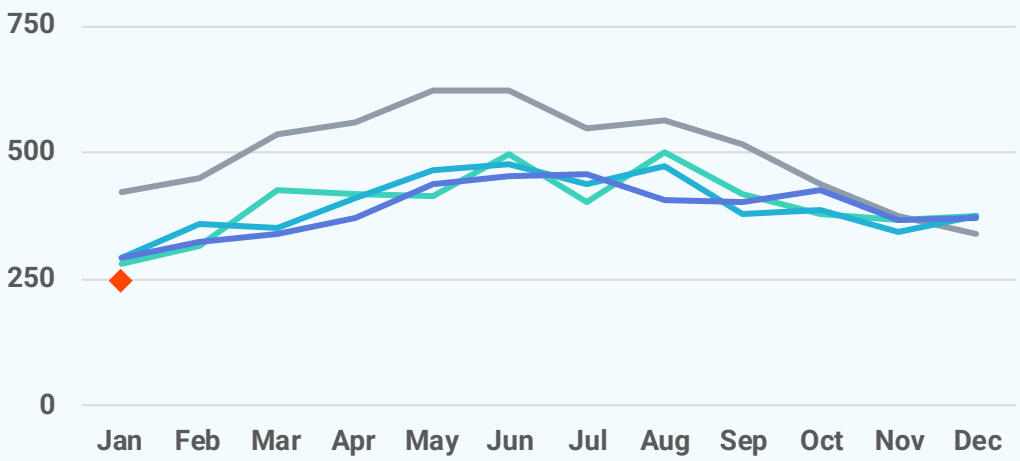
Closed Sales

2026 2025 2024 2023 2022

245
January 2026

-16.1%
Jan '26 vs. Jan '25
(Jan '25: 292)

-34.1%
Jan '26 vs. Dec '25
(Dec '25: 372)



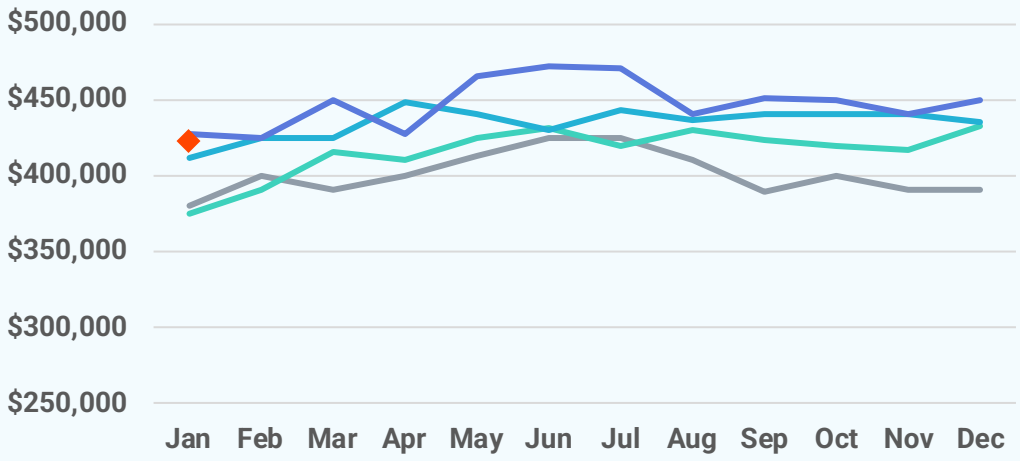
Median Sold Price

2026 2025 2024 2023 2022

$422,500
January 2026

-1.2%
Jan '26 vs. Jan '25
(Jan '25: $427,600)

-6.1%
Jan '26 vs. Dec '25
(Dec '25: $450,000)



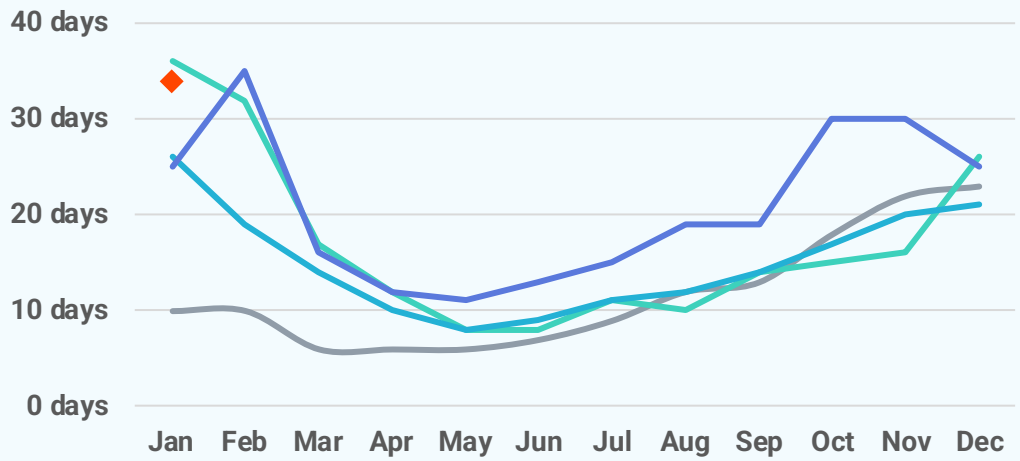
Median Days on Market

2026 2025 2024 2023 2022

34 days
January 2026

+9 days
Jan '26 vs. Jan '25
(Jan '25: 25 days)

+9 days
Jan '26 vs. Dec '25
(Dec '25: 25 days)



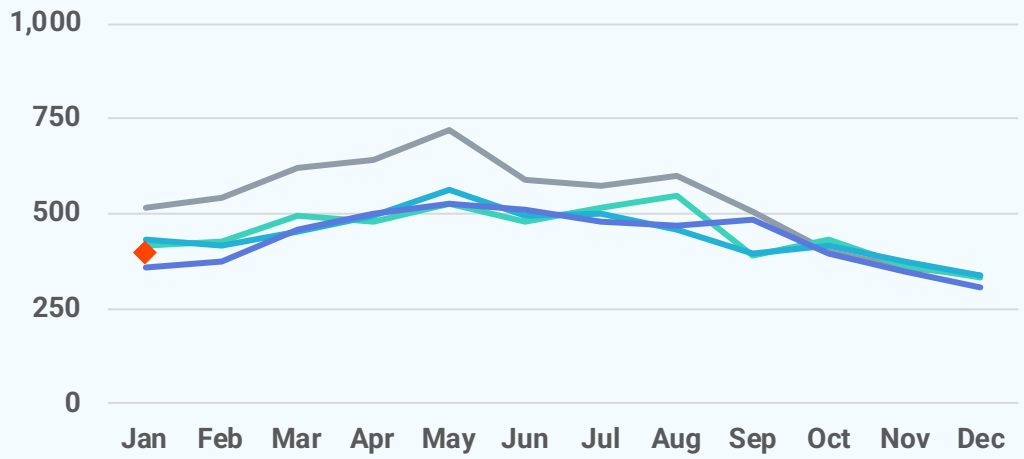
New Pending Sales

2026 2025 2024 2023 2022

396
January 2026

+10.6%
Jan '26 vs. Jan '25
(Jan '25: 358)

+29.0%
Jan '26 vs. Dec '25
(Dec '25: 307)



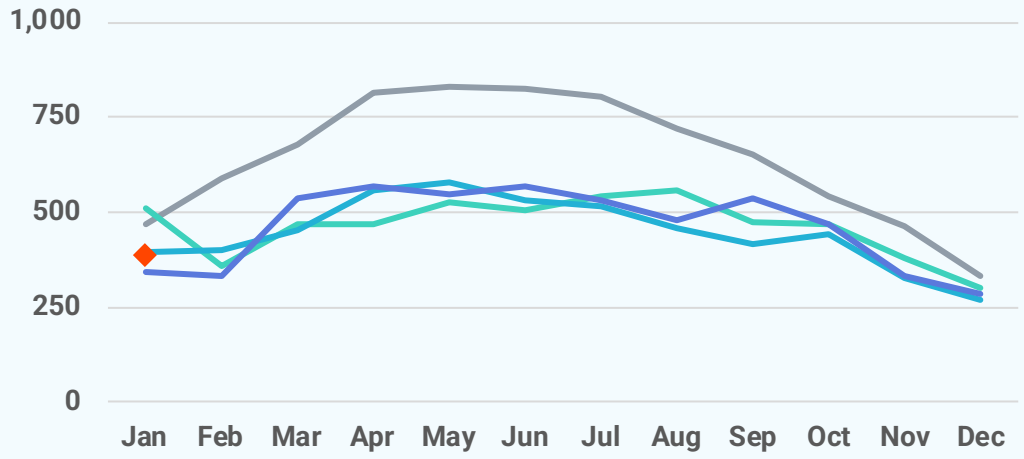
New Listings

2026 2025 2024 2023 2022

385
January 2026

+12.6%
Jan '26 vs. Jan '25
(Jan '25: 342)

+36.5%
Jan '26 vs. Dec '25
(Dec '25: 282)



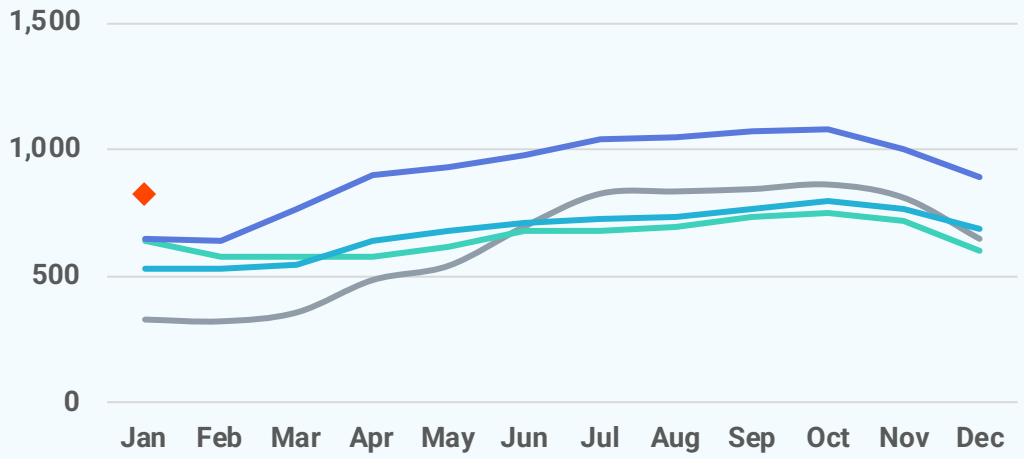
Active Listings

2026 2025 2024 2023 2022

820
January 2026

+26.5%
Jan '26 vs. Jan '25
(Jan '25: 648)

-8.1%
Jan '26 vs. Dec '25
(Dec '25: 892)



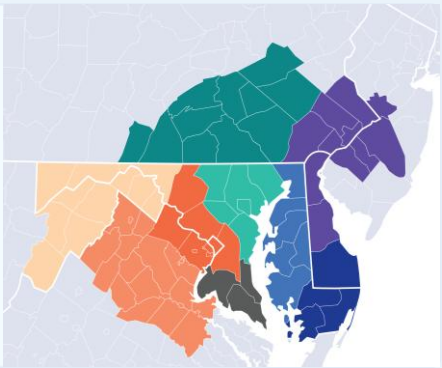
Local Markets	Closed Sales		Median Sales Price		Median Days on Market	
	Jan '26	vs. Jan '25	Jan '26	vs. Jan '25	Jan '26	vs. Jan '25
Southern MD	245	-16.1%	$422,500	-1.2%	34 days	+9 days
Calvert County, MD	47	-34.7%	$399,999	-8.0%	30 days	+10 days
Charles County, MD	128	-10.5%	$425,000	+0.5%	55 days	+30 days
Saint Mary's County, MD	70	-9.1%	$430,000	+1.2%	16 days	-11 days

Local Markets	New Pending Sales		New Listings		Showings	
	Jan '26	vs. Jan '25	Jan '26	vs. Jan '25	Jan '26	vs. Jan '25
Southern MD	396	+10.6%	385	+12.6%	6,091	+6.8%
Calvert County, MD	99	+20.7%	79	+19.7%	1,586	+7.2%
Charles County, MD	202	+10.4%	211	+1.0%	3,311	+8.0%
Saint Mary's County, MD	95	+2.2%	95	+41.8%	1,194	+3.3%

Local Markets	Active Listings		Months of Supply	
	Jan '26	vs. Jan '25	Jan '26	vs. Jan '25
Southern MD	820	+26.5%	2.03	+0.47 months
Calvert County, MD	170	+34.9%	1.83	+0.57 months
Charles County, MD	498	+28.4%	2.49	+0.56 months
Saint Mary's County, MD	152	+13.4%	1.38	+0.2 months

Local Market Map

- MD/WV Panhandle
- North Central Virginia
- Washington D.C., Metro Area
- Central Pennsylvania
- Baltimore Metro Area
- Southern Maryland
- Maryland Eastern Shore
- Philadelphia Metro Area
- Del/Mar Coastal



About Bright MLS

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Please contact **Christy Reap, Media Relations Director** with interview or information requests:

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- christy.reap@brightmls.com

Southern Maryland

January 2026 Detached Single-Family Home Report

Prepared by Bright Research

Data as of February 5, 2026

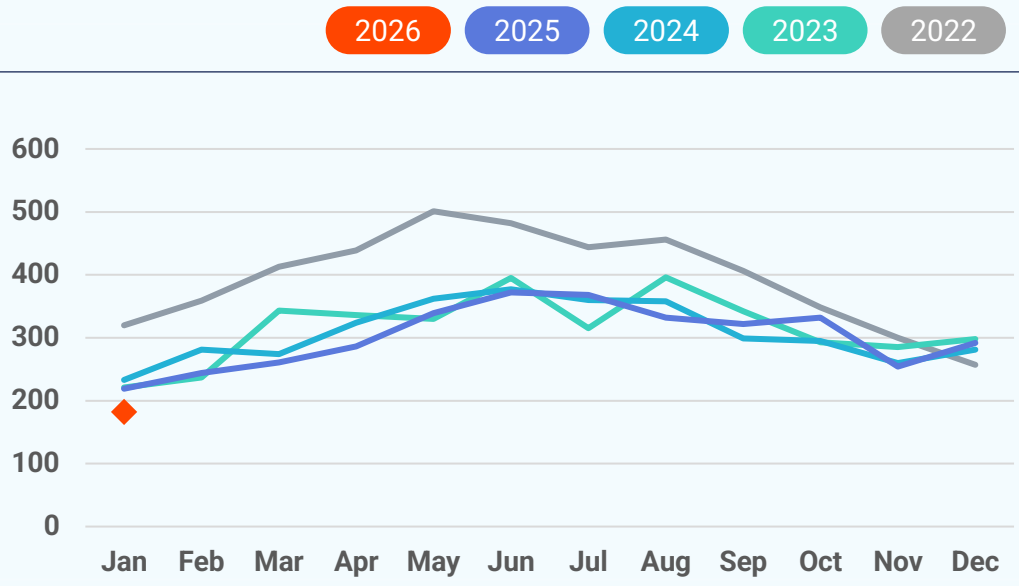
Key Market Statistics	Jan 2026	Jan 2025	Change
Closed Sales	182	219	-16.9%
Median Sold Price	$470,000	$454,950	+3.3%
Median Days on Market	39 days	26 days	+13 days
New Pending Sales	289	270	+7.0%
New Listings	270	250	+8.0%
Active Listings	628	506	+24.1%
Months of Supply	2.02	1.58	+0.44 mos.

Closed Sales

182
January 2026

-16.9%
Jan '26 vs. Jan '25
(Jan '25: 219)

-37.7%
Jan '26 vs. Dec '25
(Dec '25: 292)



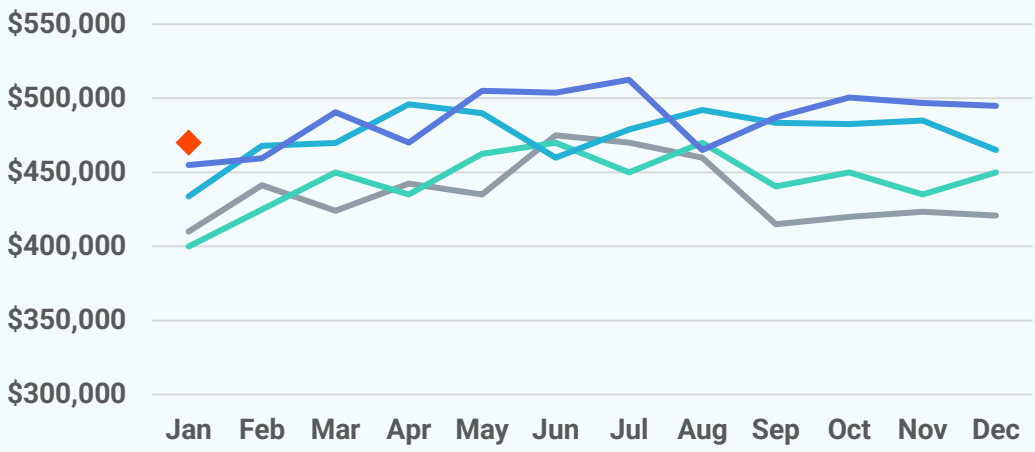
Median Sold Price

2026 2025 2024 2023 2022

$470,000
January 2026

+3.3%
Jan '26 vs. Jan '25
(Jan '25: $454,950)

-5.1%
Jan '26 vs. Dec '25
(Dec '25: $495,000)



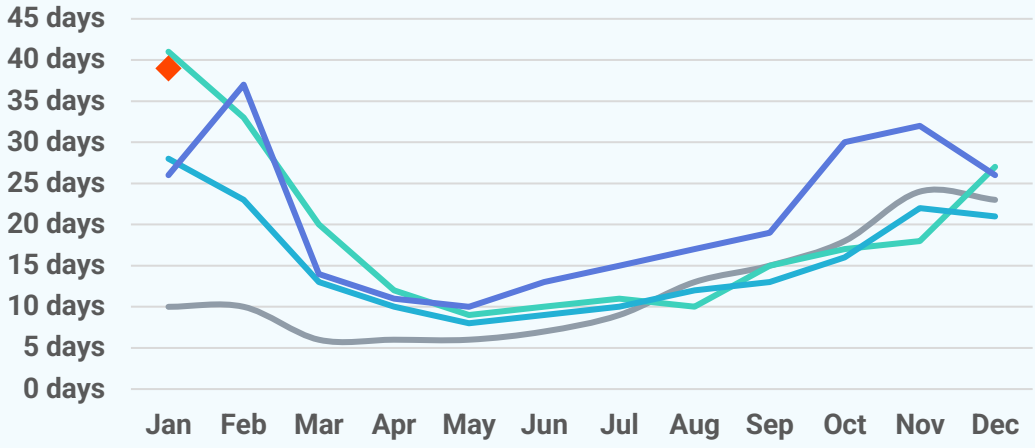
Median Days on Market

2026 2025 2024 2023 2022

39 days
January 2026

+13 days
Jan '26 vs. Jan '25
(Jan '25: 26 days)

+13 days
Jan '26 vs. Dec '25
(Dec '25: 26 days)



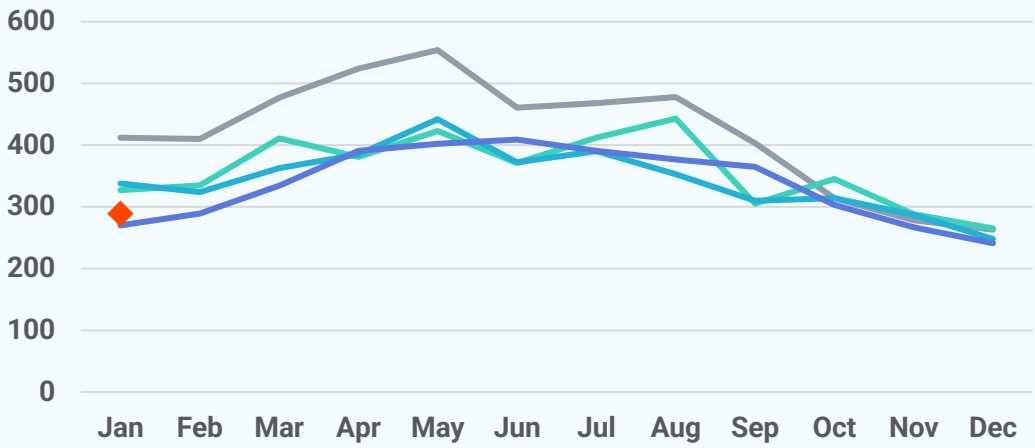
New Pending Sales

2026 2025 2024 2023 2022

289
January 2026

+7.0%
Jan '26 vs. Jan '25
(Jan '25: 270)

+19.9%
Jan '26 vs. Dec '25
(Dec '25: 241)



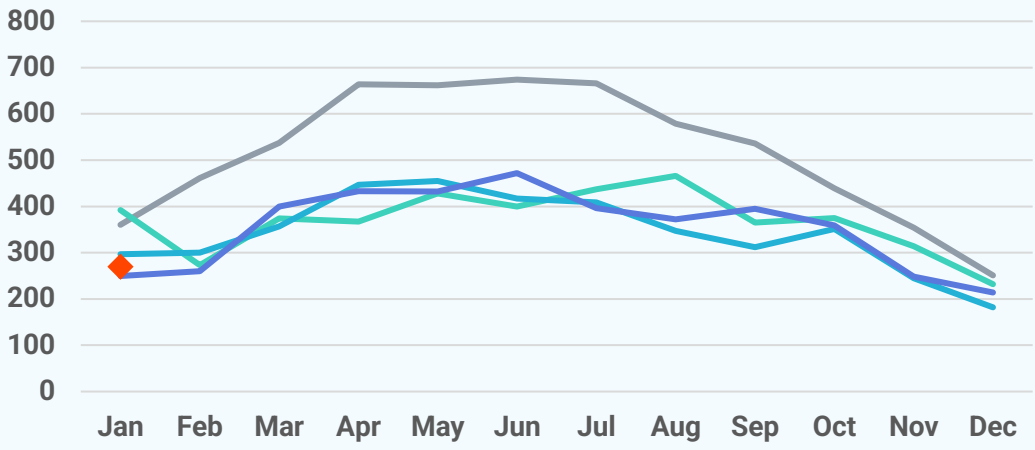
New Listings

2026 2025 2024 2023 2022

270
January 2026

+8.0%
Jan '26 vs. Jan '25
(Jan '25: 250)

+26.2%
Jan '26 vs. Dec '25
(Dec '25: 214)



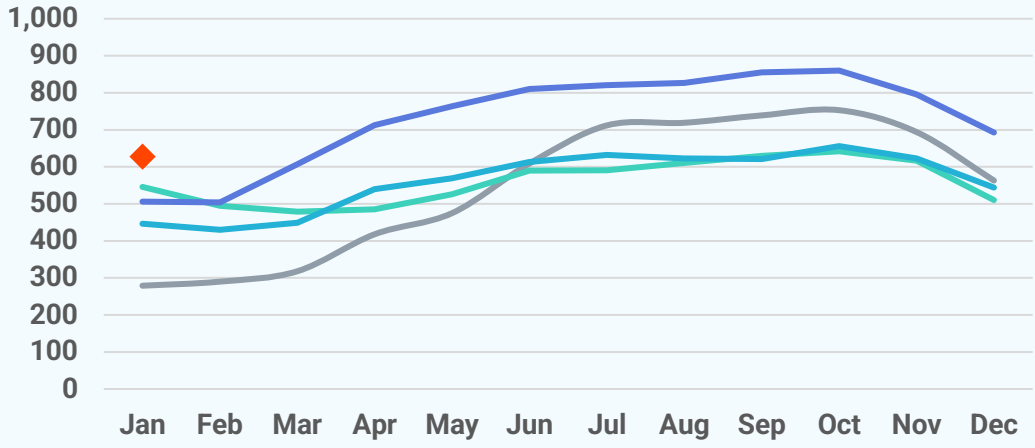
Active Listings

2026 2025 2024 2023 2022

628
January 2026

+24.1%
Jan '26 vs. Jan '25
(Jan '25: 506)

-9.4%
Jan '26 vs. Dec '25
(Dec '25: 693)



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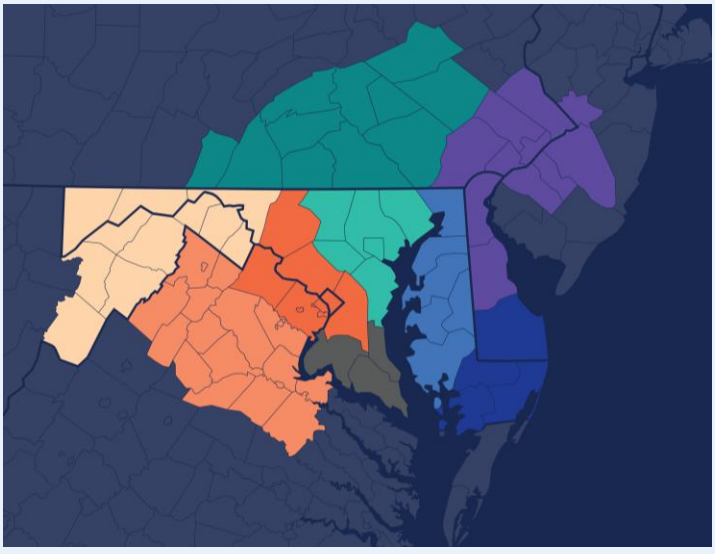


Southern Maryland

January 2026 Attached/Townhomes Report

Prepared by Bright Research

Data as of February 5, 2026

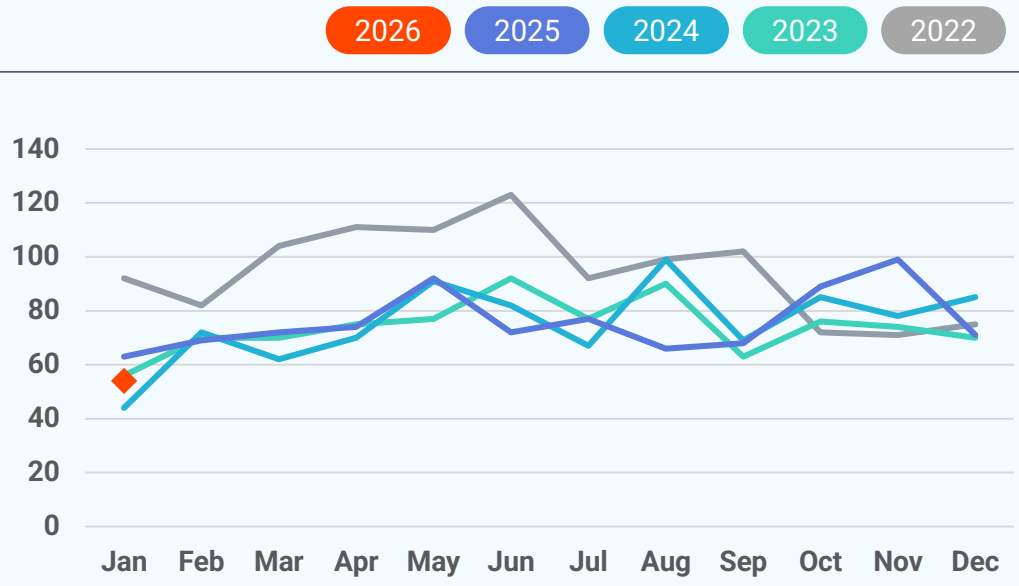
Key Market Statistics	Jan 2026	Jan 2025	Change
Closed Sales	54	63	-14.3%
Median Sold Price	$365,995	$375,000	-2.4%
Median Days on Market	28 days	25 days	+3 days
New Pending Sales	99	79	+25.3%
New Listings	108	88	+22.7%
Active Listings	182	125	+45.6%
Months of Supply	2.19	1.51	+0.68 mos.

Closed Sales

54
January 2026

-14.3%
Jan '26 vs. Jan '25
(Jan '25: 63)

-23.9%
Jan '26 vs. Dec '25
(Dec '25: 71)



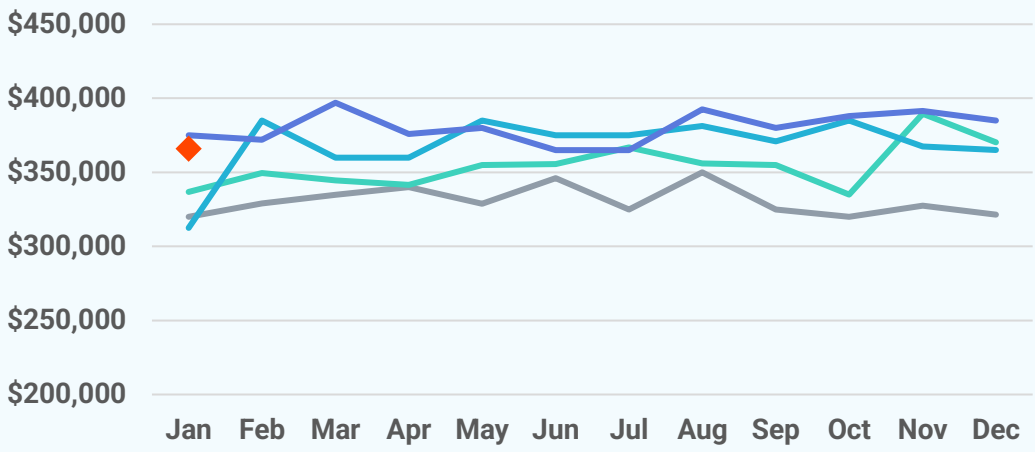
Median Sold Price

2026 2025 2024 2023 2022

$365,995
January 2026

-2.4%
Jan '26 vs. Jan '25
(Jan '25: $375,000)

-4.9%
Jan '26 vs. Dec '25
(Dec '25: $385,000)



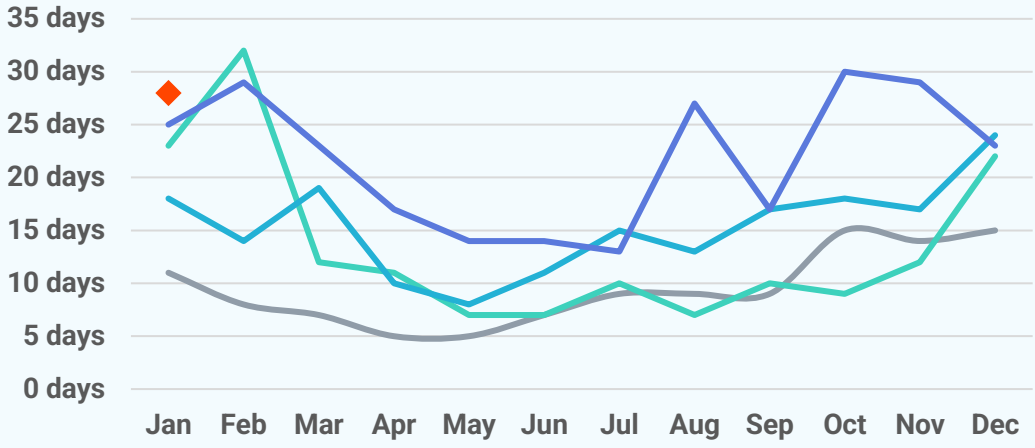
Median Days on Market

2026 2025 2024 2023 2022

28 days
January 2026

+3 days
Jan '26 vs. Jan '25
(Jan '25: 25 days)

+5 days
Jan '26 vs. Dec '25
(Dec '25: 23 days)



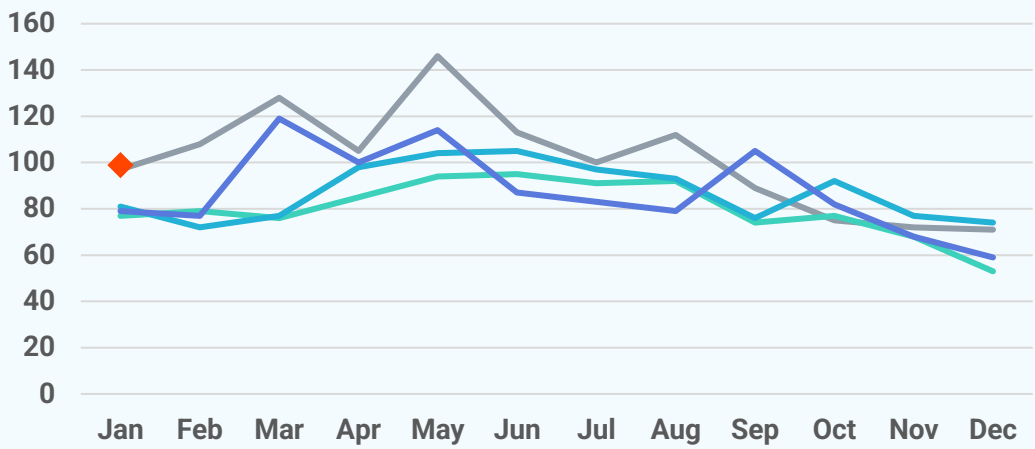
New Pending Sales

2026 2025 2024 2023 2022

99
January 2026

+25.3%
Jan '26 vs. Jan '25
(Jan '25: 79)

+67.8%
Jan '26 vs. Dec '25
(Dec '25: 59)



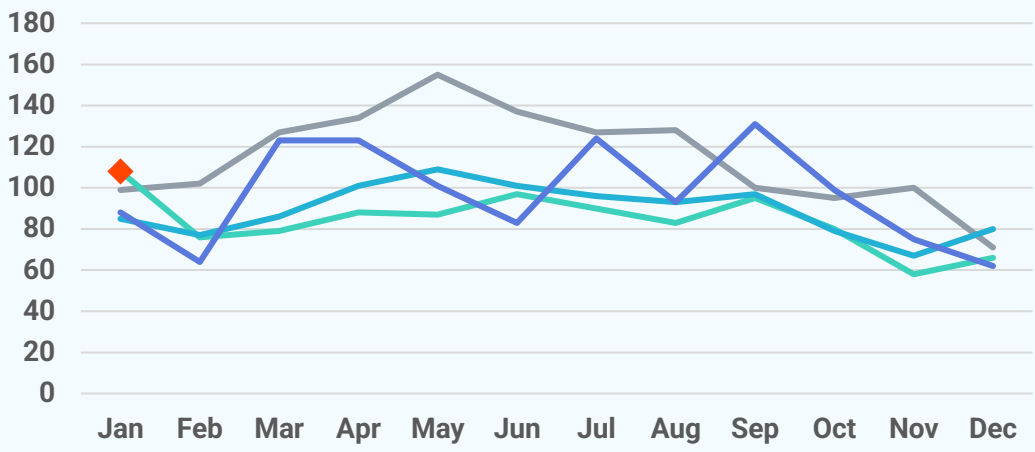
New Listings

2026 2025 2024 2023 2022

108
January 2026

+22.7%
Jan '26 vs. Jan '25
(Jan '25: 88)

+74.2%
Jan '26 vs. Dec '25
(Dec '25: 62)



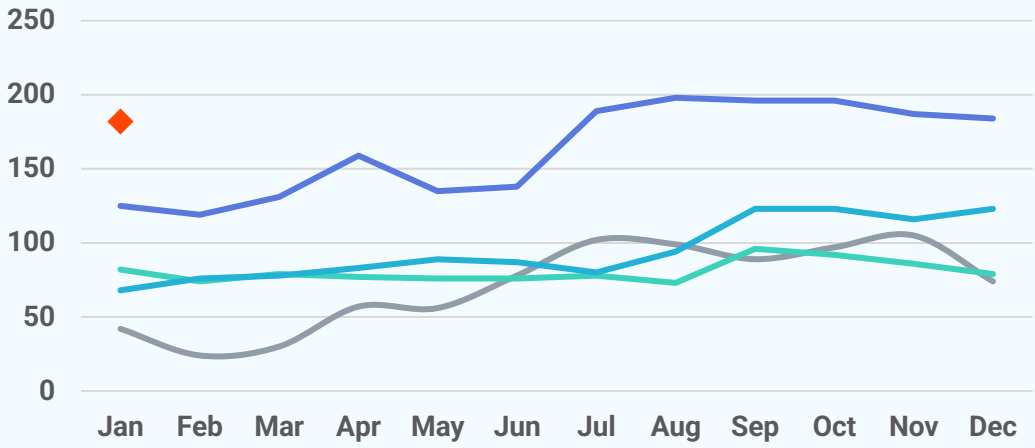
Active Listings

2026 2025 2024 2023 2022

182
January 2026

+45.6%
Jan '26 vs. Jan '25
(Jan '25: 125)

-1.1%
Jan '26 vs. Dec '25
(Dec '25: 184)



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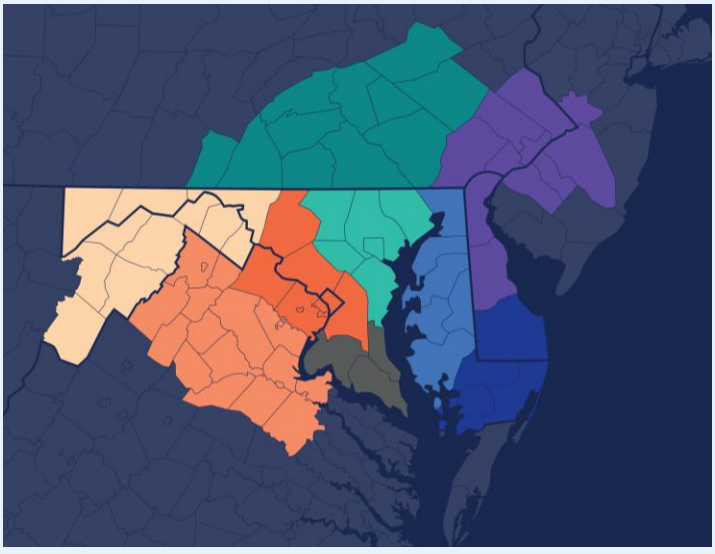


Southern Maryland

January 2026 Condos Report

Prepared by Bright Research

Data as of February 5, 2026

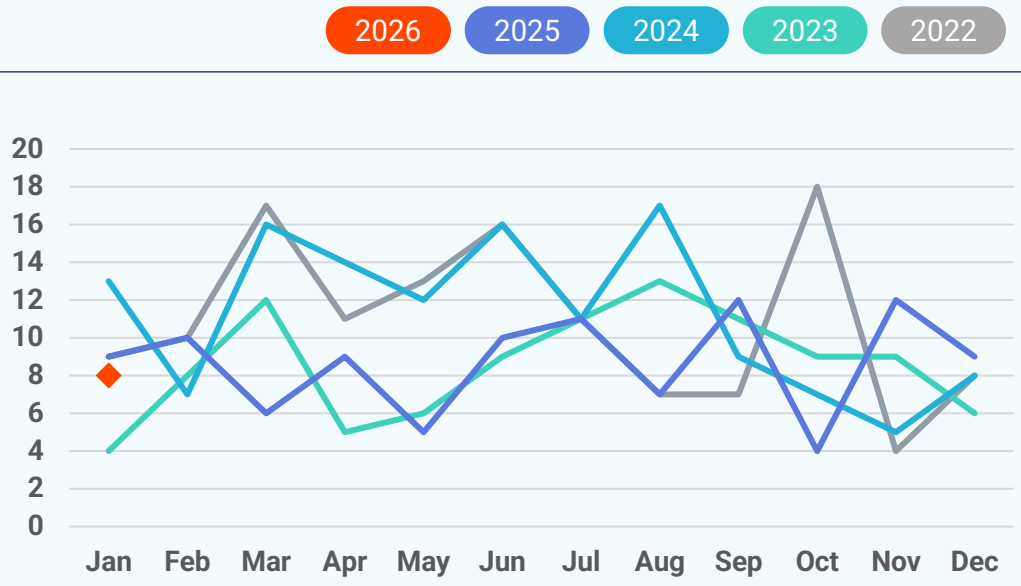
Key Market Statistics	Jan 2026	Jan 2025	Change
Closed Sales	8	9	-11.1%
Median Sold Price	$205,000	$150,000	+36.7%
Median Days on Market	22 days	16 days	+6 days
New Pending Sales	8	9	-11.1%
New Listings	7	4	+75.0%
Active Listings	10	17	-41.2%
Months of Supply	1.25	1.55	-0.30 mos.

Closed Sales

8
January 2026

-11.1%
Jan '26 vs. Jan '25
(Jan '25: 9)

-11.1%
Jan '26 vs. Dec '25
(Dec '25: 9)



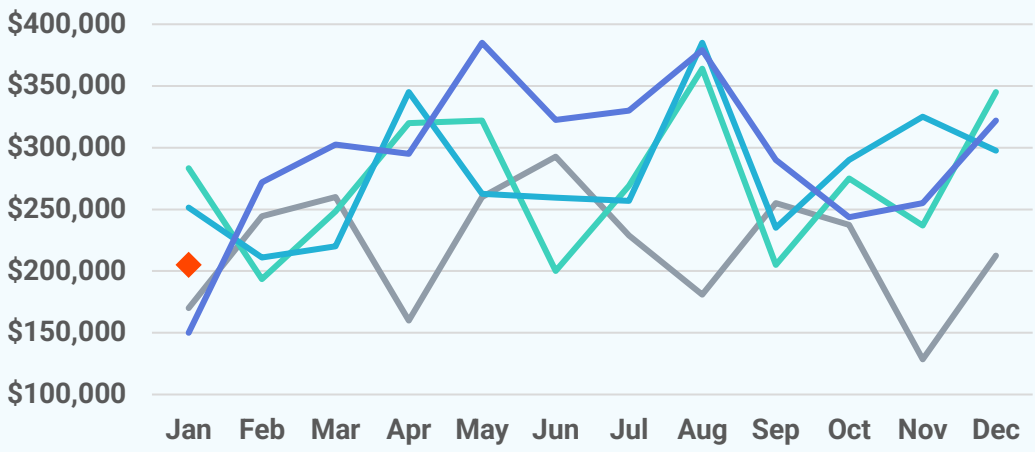
Median Sold Price

2026 2025 2024 2023 2022

$205,000
January 2026

+36.7%
Jan '26 vs. Jan '25
(Jan '25: $150,000)

-36.3%
Jan '26 vs. Dec '25
(Dec '25: $322,000)



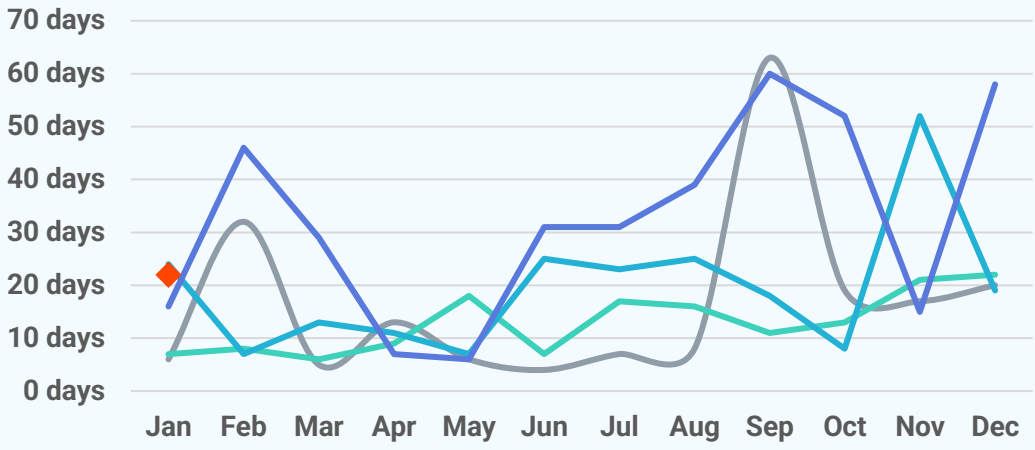
Median Days on Market

2026 2025 2024 2023 2022

22 days
January 2026

+6 days
Jan '26 vs. Jan '25
(Jan '25: 16 days)

-36 days
Jan '26 vs. Dec '25
(Dec '25: 58 days)



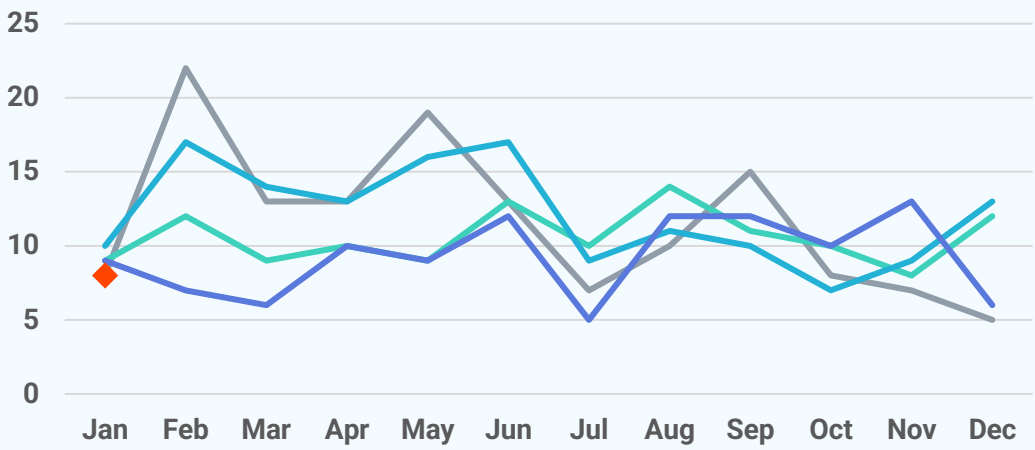
New Pending Sales

2026 2025 2024 2023 2022

8
January 2026

-11.1%
Jan '26 vs. Jan '25
(Jan '25: 9)

+33.3%
Jan '26 vs. Dec '25
(Dec '25: 6)



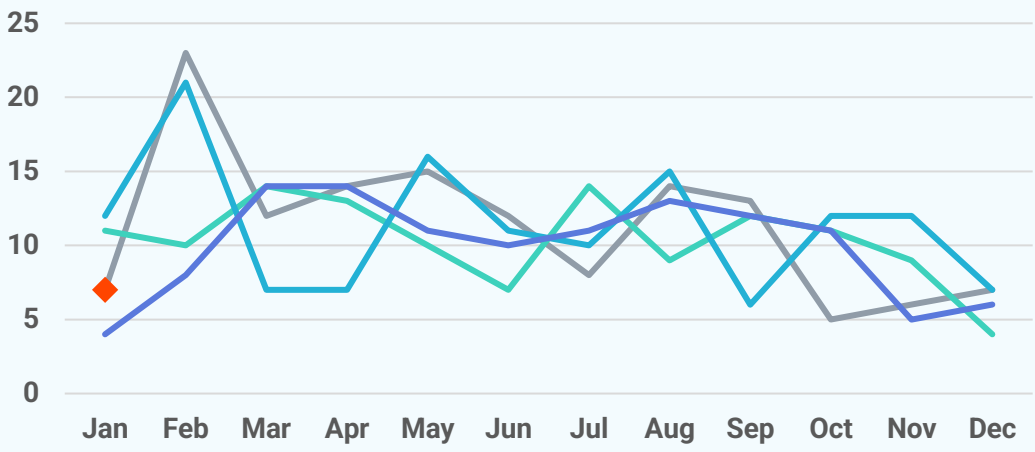
New Listings

2026 2025 2024 2023 2022

7
January 2026

+75.0%
Jan '26 vs. Jan '25
(Jan '25: 4)

+16.7%
Jan '26 vs. Dec '25
(Dec '25: 6)



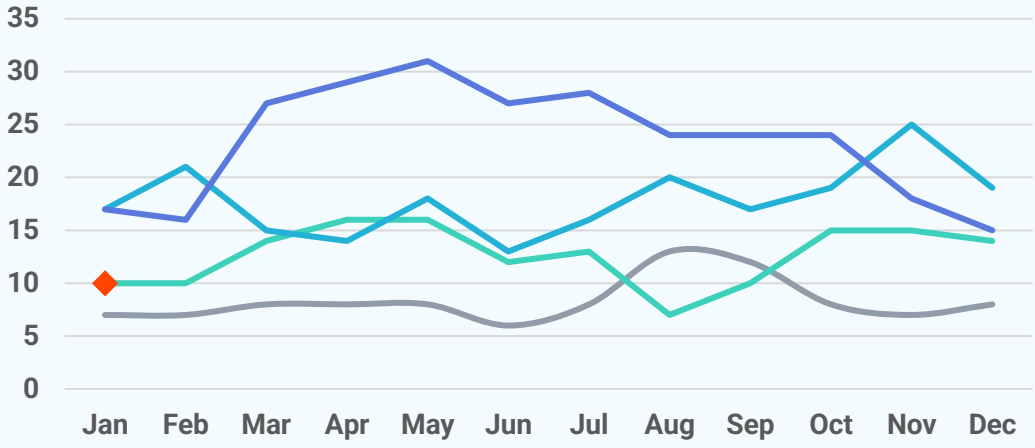
Active Listings

2026 2025 2024 2023 2022

10
January 2026

-41.2%
Jan '26 vs. Jan '25
(Jan '25: 17)

-33.3%
Jan '26 vs. Dec '25
(Dec '25: 15)



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