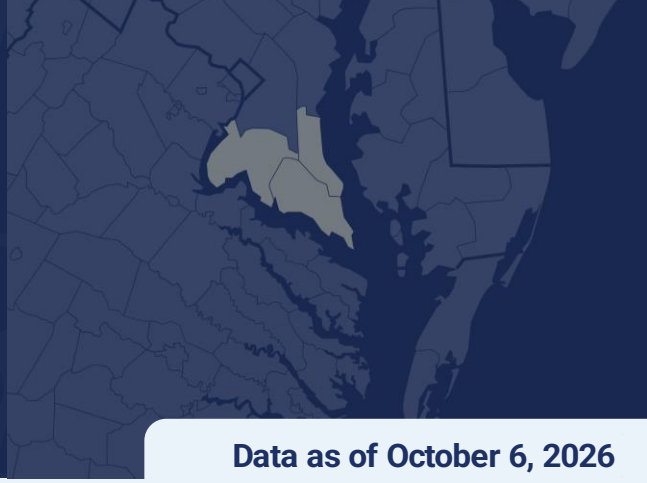
Southern Maryland

September 2026 Housing Market Report

Prepared by Bright Research



Data as of October 6, 2026

Key Market Statistics	Sep 2026	Sep 2025	Change	YTD 2026	YTD 2025	Change
Closed Sales	376	402	-6.5%	3,825	3,670	+4.2%
Median Sold Price	$455,000	$450,500	+1.0%	$449,900	$450,000	-0.0%
Median Days on Market	29 days	19 days	+10 days	22 days	16 days	+6 days
New Pending Sales	381	482	-21.0%	3,971	3,951	+0.5%
New Listings	563	538	+4.6%	5,720	5,543	+3.2%
Active Listings	1,337	1,075	+24.4%	1,337	1,075	+24.4%
Months of Supply	3.20	2.67	+0.53 mos.	3.20	2.67	+0.53 mos.
Showings	6,416	6,848	-6.3%	69,989	67,202	+4.1%

Housing Market Trends

September marked a major turnaround in the Southern Maryland housing market. While year-to-date sales in the region are tracking 4.2% above last year, total sales in September fell by 6.5% year-over-year, driven by a sharp drop in sales in Saint Mary's County.

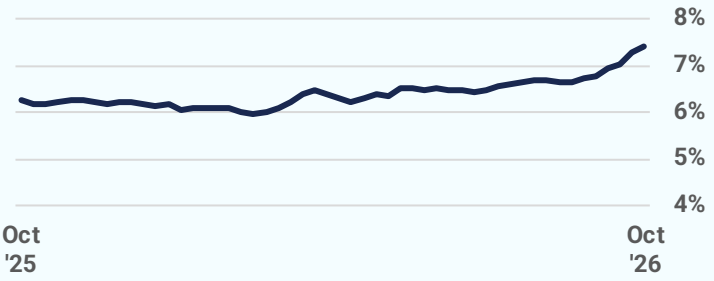
New pending sales provide a leading indicator of future closed sales, and all signs point to further declines. There were 381 new pending sales across the region in September, a 21.0% drop off from last September. New pending sales were down year-over-year in all local markets. Regionwide, showings fell by 6.3% in September, though showing activity was higher in Calvert County.

More new listings continue to come onto the market, with a gain of 4.6% compared to a year ago. At the end of the month, there was a total of 1,337 active listings, a 24.4% increase from a year ago. Overall, single-family inventory is still below pre-pandemic levels.

Market Outlook

After resiliency in the housing market earlier this year, higher mortgage rates are quelling home sales across the region. As the average rate moved above 7%, more buyers are hitting affordability ceilings. Home price growth has slowed and as inventory increases, it is possible we could see year-over-year price declines in some isolated markets.

Weekly Avg. Mortgage Rate 30-yr fixed rate



Source: Freddie Mac

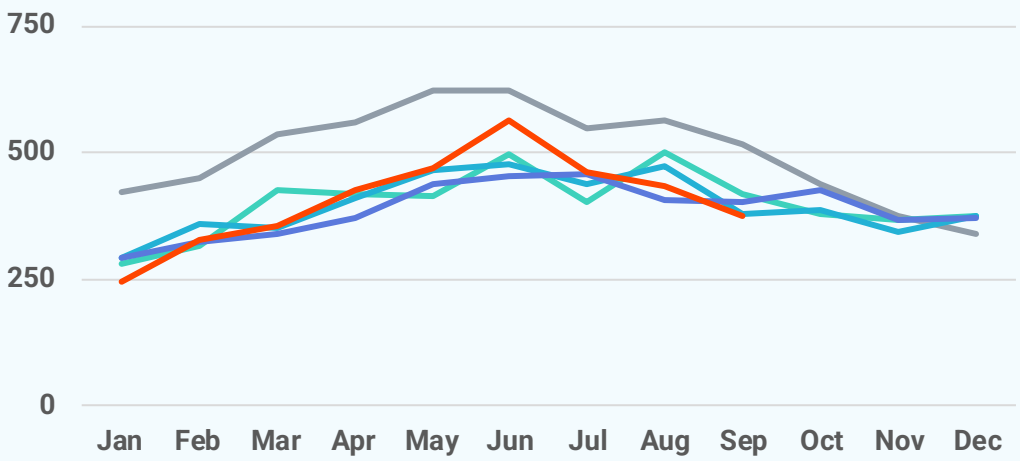
Closed Sales

2026 2025 2024 2023 2022

376
September 2026

-6.5%
Sep '26 vs. Sep '25
(Sep '25: 402)

-13.6%
Sep '26 vs. Aug '26
(Aug '26: 435)



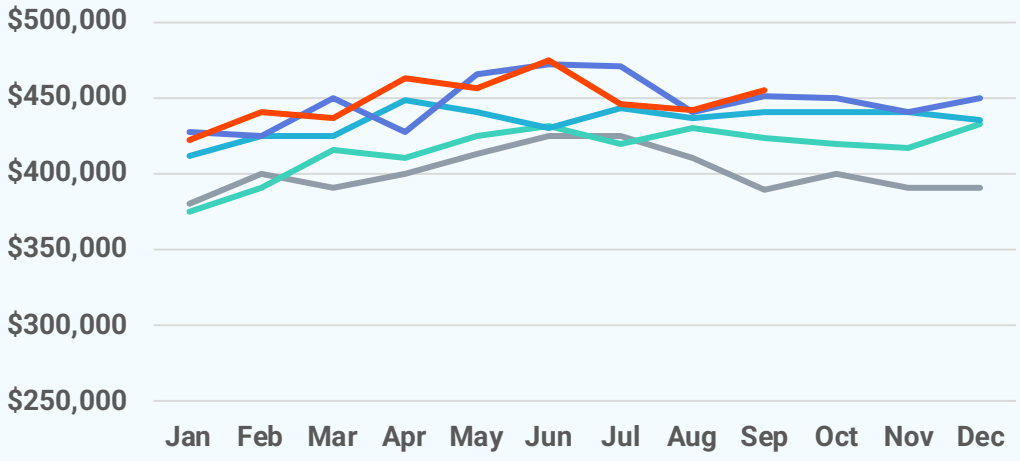
Median Sold Price

2026 2025 2024 2023 2022

$455,000
September 2026

+1.0%
Sep '26 vs. Sep '25
(Sep '25: $450,500)

+2.9%
Sep '26 vs. Aug '26
(Aug '26: $442,000)



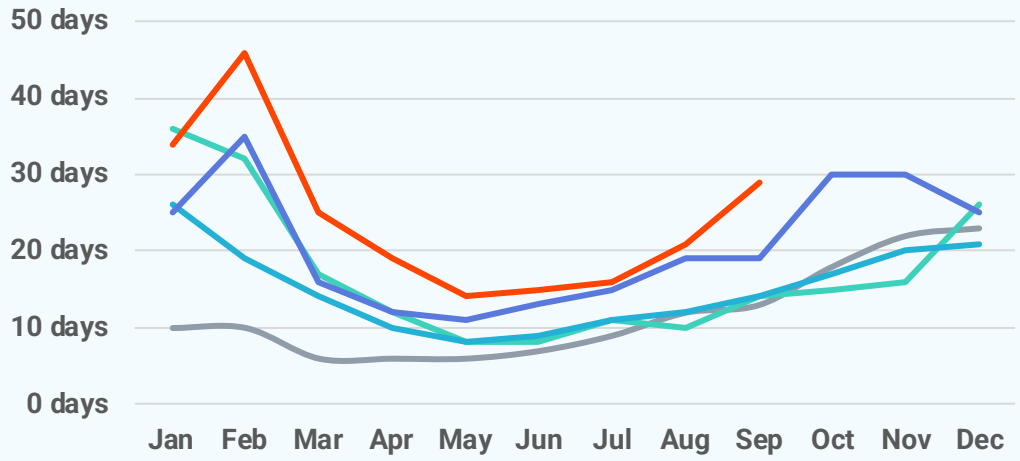
Median Days on Market

2026 2025 2024 2023 2022

29 days
September 2026

+10 days
Sep '26 vs. Sep '25
(Sep '25: 19 days)

+8 days
Sep '26 vs. Aug '26
(Aug '26: 21 days)



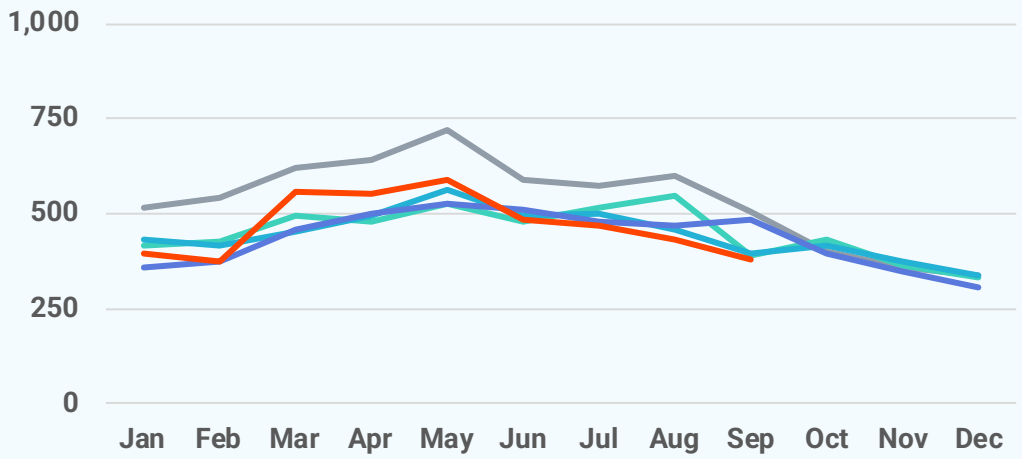
New Pending Sales

2026 2025 2024 2023 2022

381
September 2026

-21.0%
Sep '26 vs. Sep '25
(Sep '25: 482)

-11.2%
Sep '26 vs. Aug '26
(Aug '26: 429)



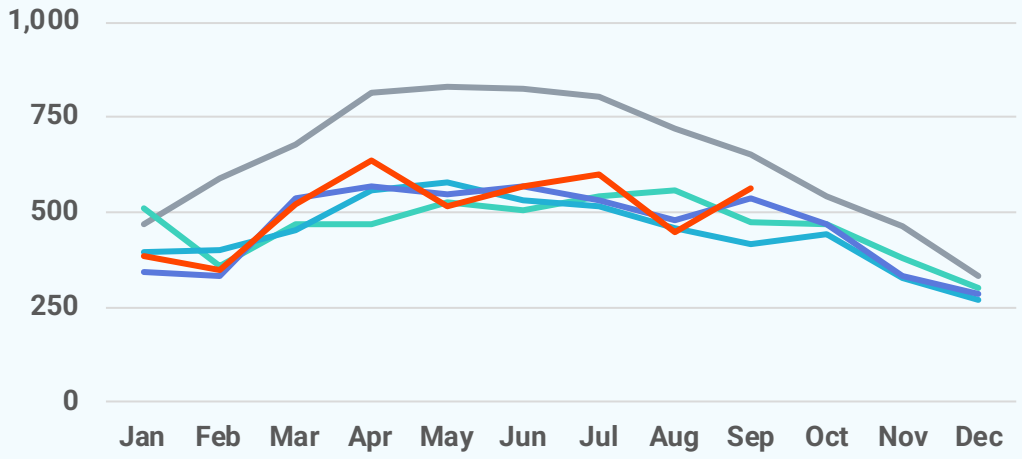
New Listings

2026 2025 2024 2023 2022

563
September 2026

+4.6%
Sep '26 vs. Sep '25
(Sep '25: 538)

+26.2%
Sep '26 vs. Aug '26
(Aug '26: 446)



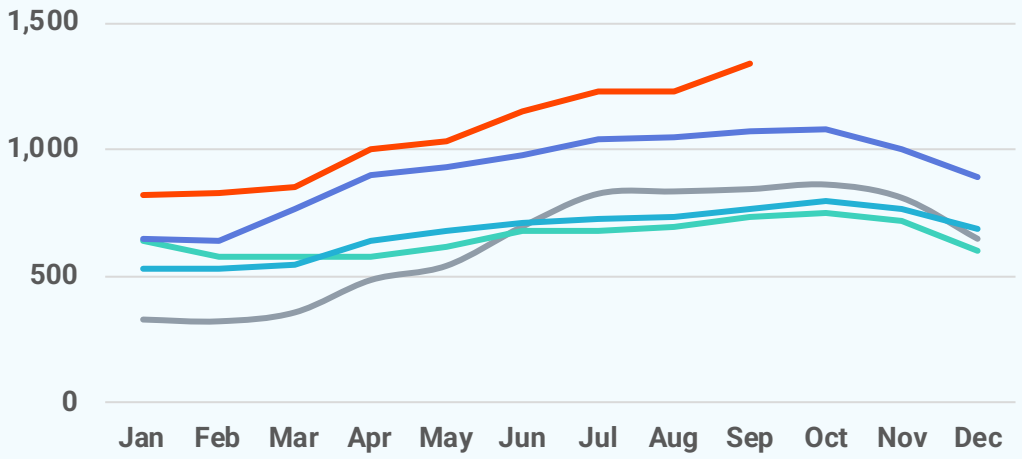
Active Listings

2026 2025 2024 2023 2022

1,337
September 2026

+24.4%
Sep '26 vs. Sep '25
(Sep '25: 1,075)

+8.9%
Sep '26 vs. Aug '26
(Aug '26: 1,228)



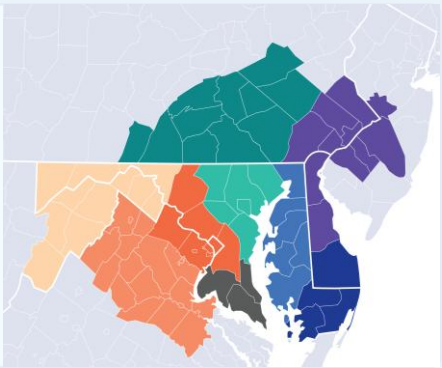
Local Markets	Closed Sales		Median Sales Price		Median Days on Market	
	Sep '26	vs. Sep '25	Sep '26	vs. Sep '25	Sep '26	vs. Sep '25
Southern MD	376	-6.5%	$455,000	+1.0%	29 days	+10 days
Calvert County, MD	99	+11.2%	$475,000	+0.0%	25 days	+14 days
Charles County, MD	184	+0.5%	$459,999	-1.1%	39 days	+14 days
Saint Mary's County, MD	93	-28.5%	$425,000	+3.8%	16 days	+2 days

Local Markets	New Pending Sales		New Listings		Showings	
	Sep '26	vs. Sep '25	Sep '26	vs. Sep '25	Sep '26	vs. Sep '25
Southern MD	381	-21.0%	563	+4.6%	6,416	-6.3%
Calvert County, MD	97	-4.0%	144	+21.0%	1,724	+9.4%
Charles County, MD	191	-20.1%	308	+5.8%	3,316	-9.1%
Saint Mary's County, MD	93	-34.5%	111	-13.3%	1,376	-15.2%

Local Markets	Active Listings		Months of Supply	
	Sep '26	vs. Sep '25	Sep '26	vs. Sep '25
Southern MD	1,337	+24.4%	3.20	+0.53 months
Calvert County, MD	339	+52.0%	3.23	+0.93 months
Charles County, MD	722	+16.8%	3.59	+0.44 months
Saint Mary's County, MD	276	+17.9%	2.46	+0.31 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:

- (202) 309-9362
- christy.reap@brightmls.com

Southern Maryland

September 2026 Detached Single-Family Home Report

Prepared by Bright Research

Data as of October 6, 2026

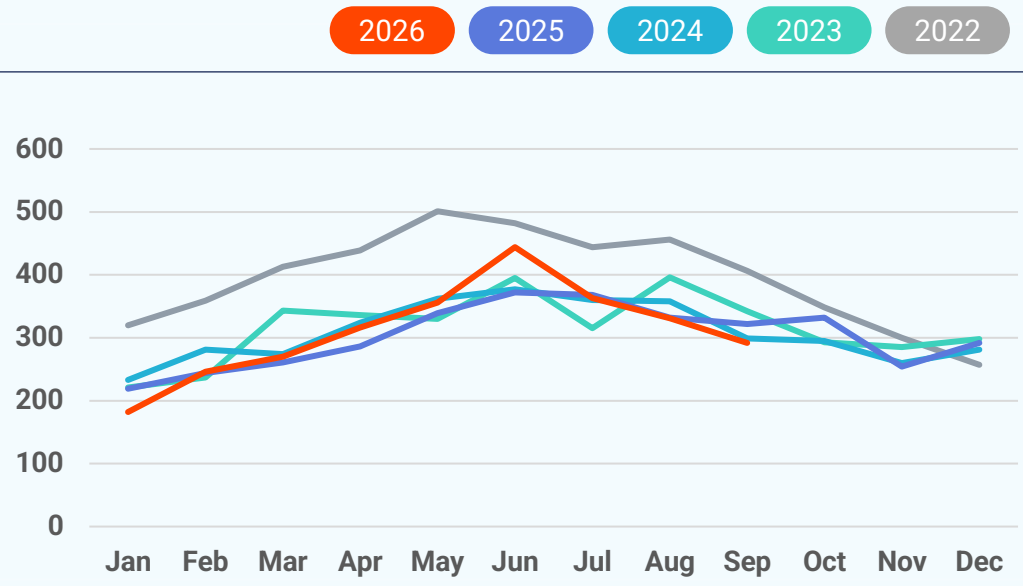
Key Market Statistics	Sep 2026	Sep 2025	Change
Closed Sales	292	322	-9.3%
Median Sold Price	$478,590	$487,200	-1.8%
Median Days on Market	26 days	19 days	+7 days
New Pending Sales	298	365	-18.4%
New Listings	428	395	+8.4%
Active Listings	1,058	855	+23.7%
Months of Supply	3.34	2.75	+0.59 mos.

Closed Sales

292
September 2026

-9.3%
Sep '26 vs. Sep '25
(Sep '25: 322)

-11.8%
Sep '26 vs. Aug '26
(Aug '26: 331)



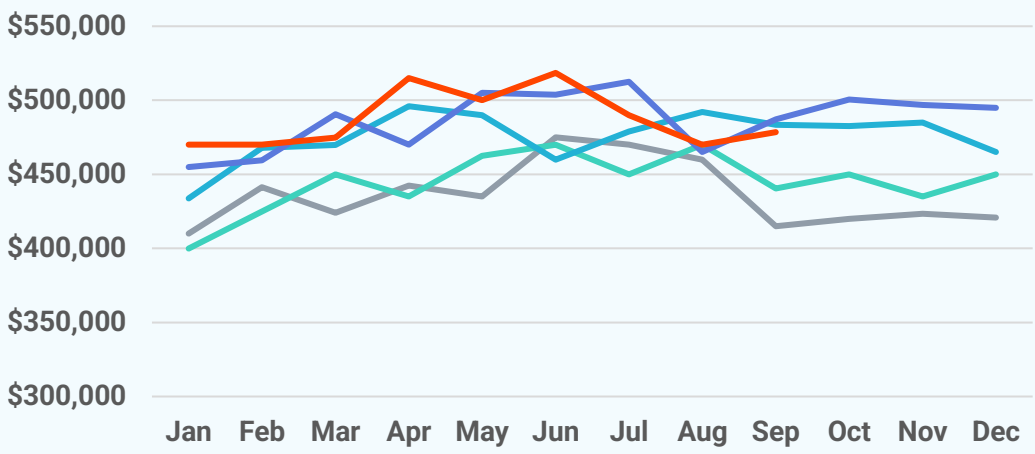
Median Sold Price

2026 2025 2024 2023 2022

$478,590
September 2026

-1.8%
Sep '26 vs. Sep '25
(Sep '25: $487,200)

+1.8%
Sep '26 vs. Aug '26
(Aug '26: $469,990)



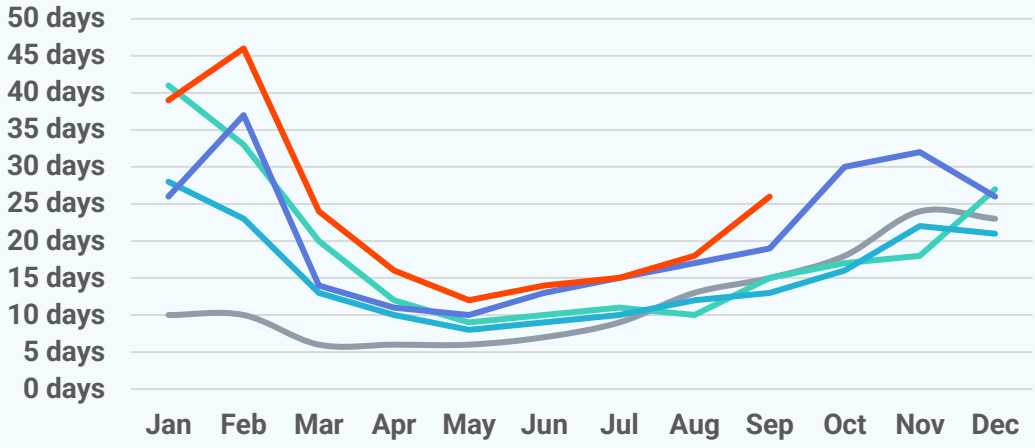
Median Days on Market

2026 2025 2024 2023 2022

26 days
September 2026

+7 days
Sep '26 vs. Sep '25
(Sep '25: 19 days)

+8 days
Sep '26 vs. Aug '26
(Aug '26: 18 days)



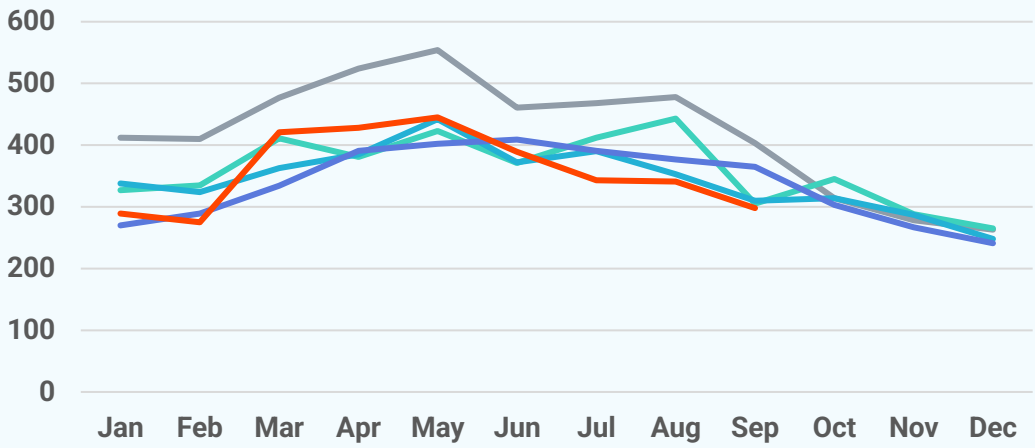
New Pending Sales

2026 2025 2024 2023 2022

298
September 2026

-18.4%
Sep '26 vs. Sep '25
(Sep '25: 365)

-12.6%
Sep '26 vs. Aug '26
(Aug '26: 341)



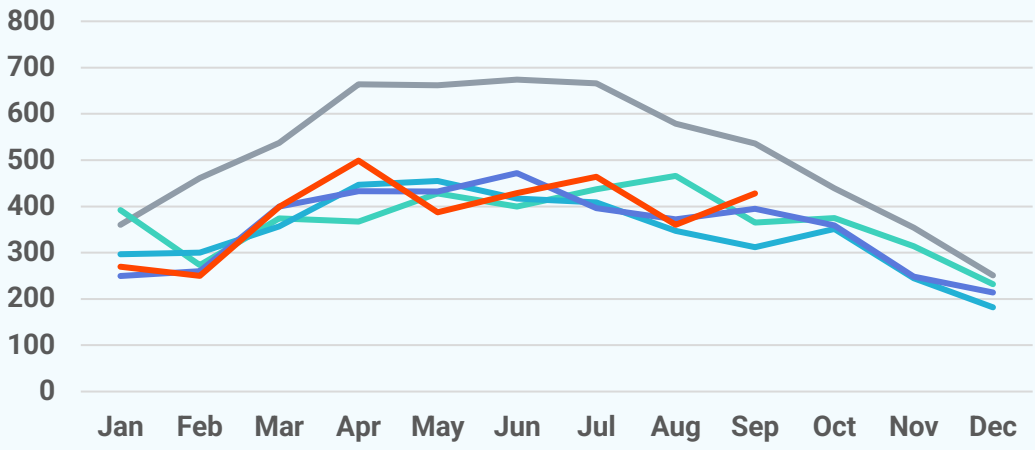
New Listings

2026 2025 2024 2023 2022

428
September 2026

+8.4%
Sep '26 vs. Sep '25
(Sep '25: 395)

+18.9%
Sep '26 vs. Aug '26
(Aug '26: 360)



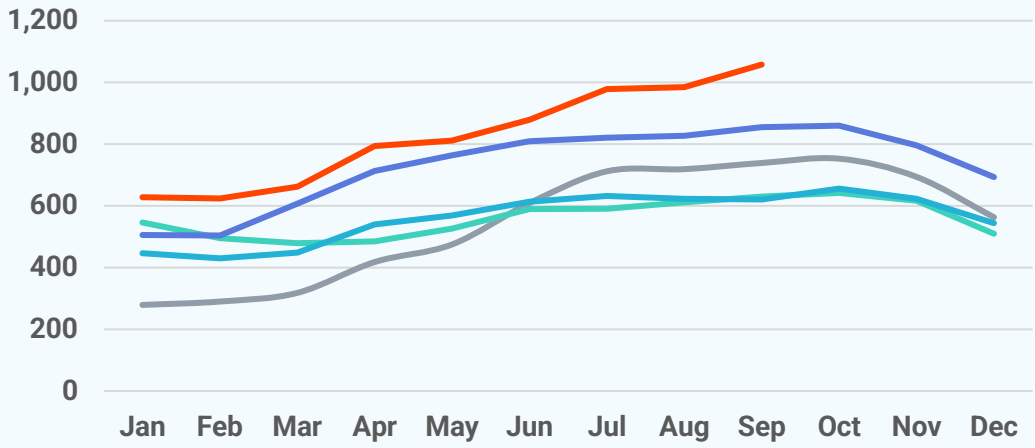
Active Listings

2026 2025 2024 2023 2022

1,058
September 2026

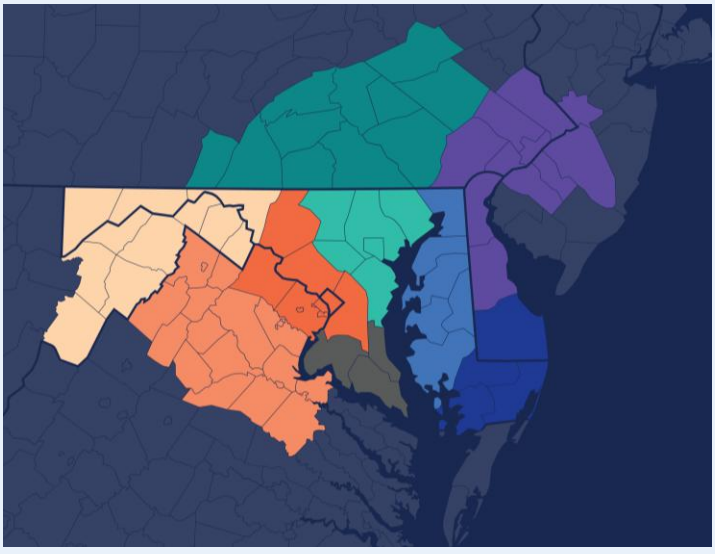
+23.7%
Sep '26 vs. Sep '25
(Sep '25: 855)

+7.4%
Sep '26 vs. Aug '26
(Aug '26: 985)



About Bright MLS

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Southern Maryland

September 2026 Attached/Townhomes Report

Prepared by Bright Research

Data as of October 6, 2026

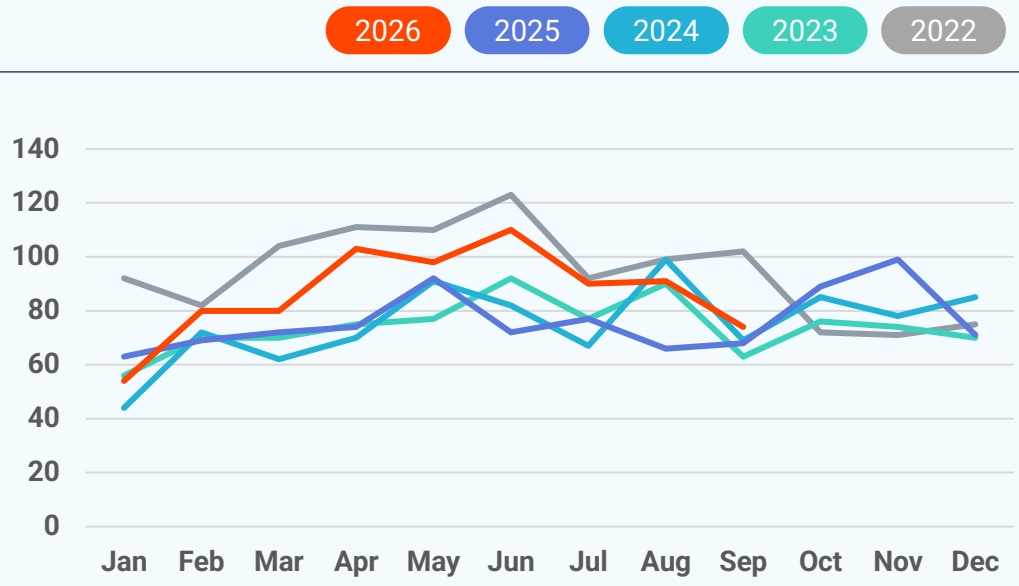
Key Market Statistics	Sep 2026	Sep 2025	Change
Closed Sales	74	68	+8.8%
Median Sold Price	$384,107	$379,995	+1.1%
Median Days on Market	35 days	17 days	+18 days
New Pending Sales	72	105	-31.4%
New Listings	124	131	-5.3%
Active Listings	260	196	+32.7%
Months of Supply	2.83	2.36	+0.47 mos.

Closed Sales

74
September 2026

+8.8%
Sep '26 vs. Sep '25
(Sep '25: 68)

-18.7%
Sep '26 vs. Aug '26
(Aug '26: 91)



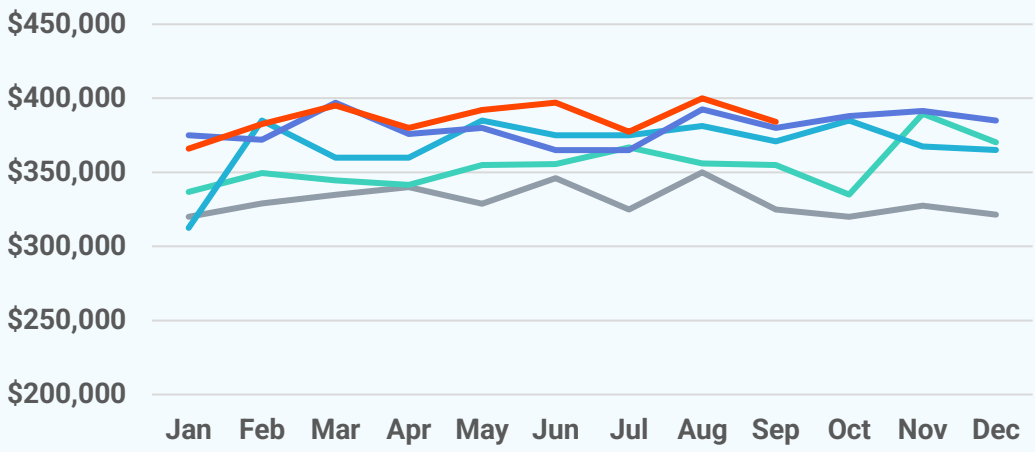
Median Sold Price

2026 2025 2024 2023 2022

$384,107
September 2026

+1.1%
Sep '26 vs. Sep '25
(Sep '25: $379,995)

-4.0%
Sep '26 vs. Aug '26
(Aug '26: $400,000)



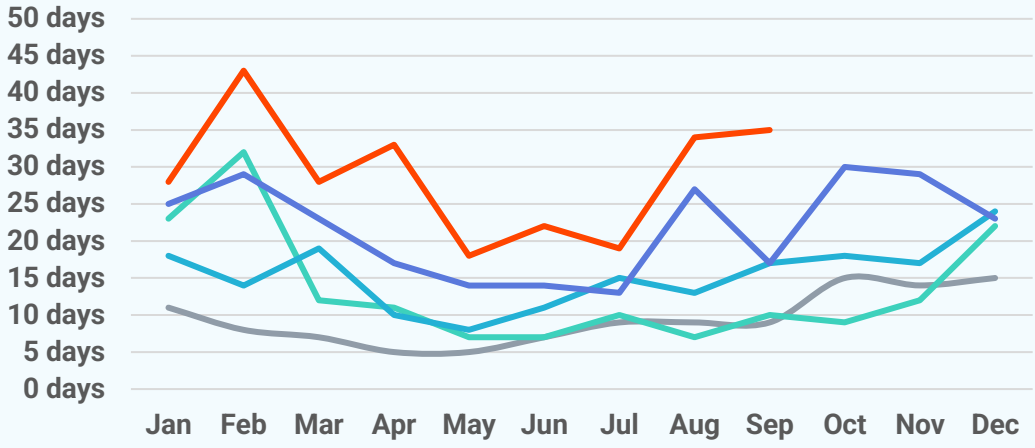
Median Days on Market

2026 2025 2024 2023 2022

35 days
September 2026

+18 days
Sep '26 vs. Sep '25
(Sep '25: 17 days)

+1 day
Sep '26 vs. Aug '26
(Aug '26: 34 days)



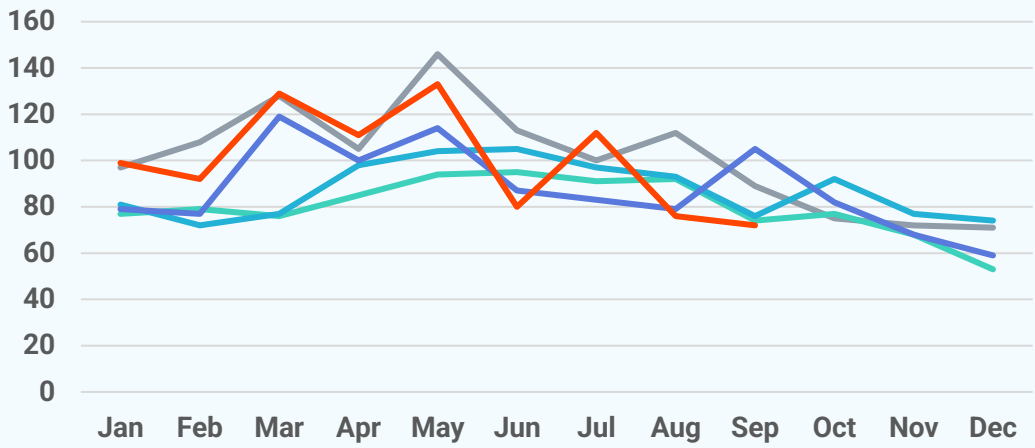
New Pending Sales

2026 2025 2024 2023 2022

72
September 2026

-31.4%
Sep '26 vs. Sep '25
(Sep '25: 105)

-5.3%
Sep '26 vs. Aug '26
(Aug '26: 76)



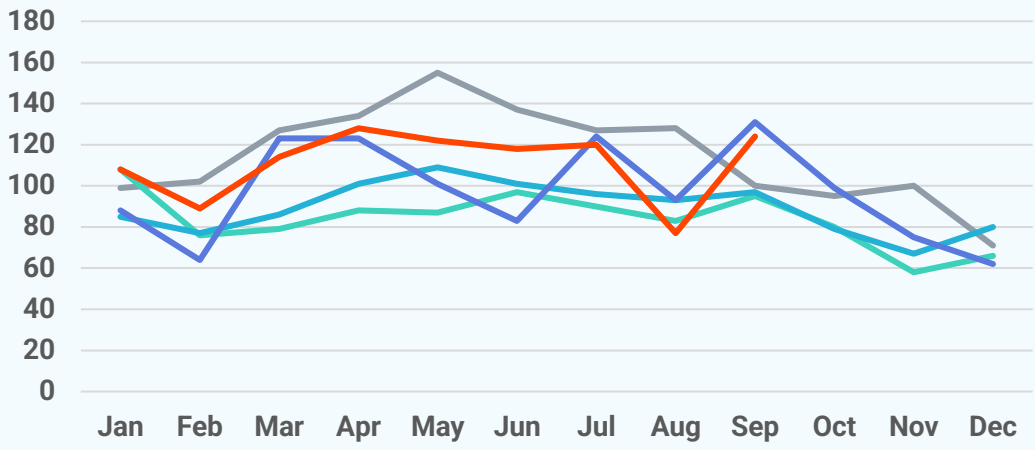
New Listings

2026 2025 2024 2023 2022

124
September 2026

-5.3%
Sep '26 vs. Sep '25
(Sep '25: 131)

+61.0%
Sep '26 vs. Aug '26
(Aug '26: 77)



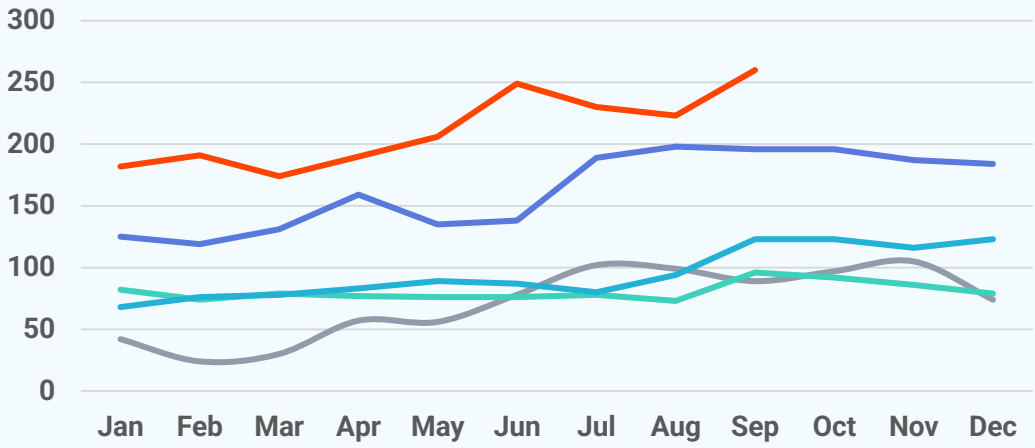
Active Listings

2026 2025 2024 2023 2022

260
September 2026

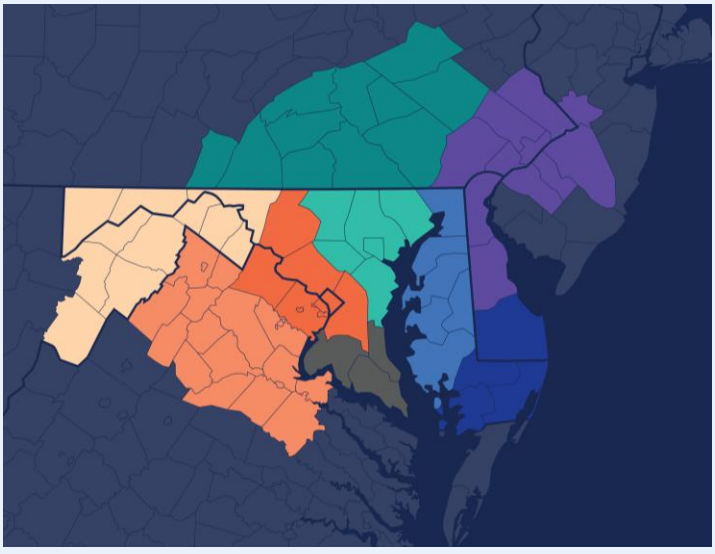
+32.7%
Sep '26 vs. Sep '25
(Sep '25: 196)

+16.6%
Sep '26 vs. Aug '26
(Aug '26: 223)



About Bright MLS

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Southern Maryland

September 2026 Condos Report

Prepared by Bright Research

Data as of October 6, 2026

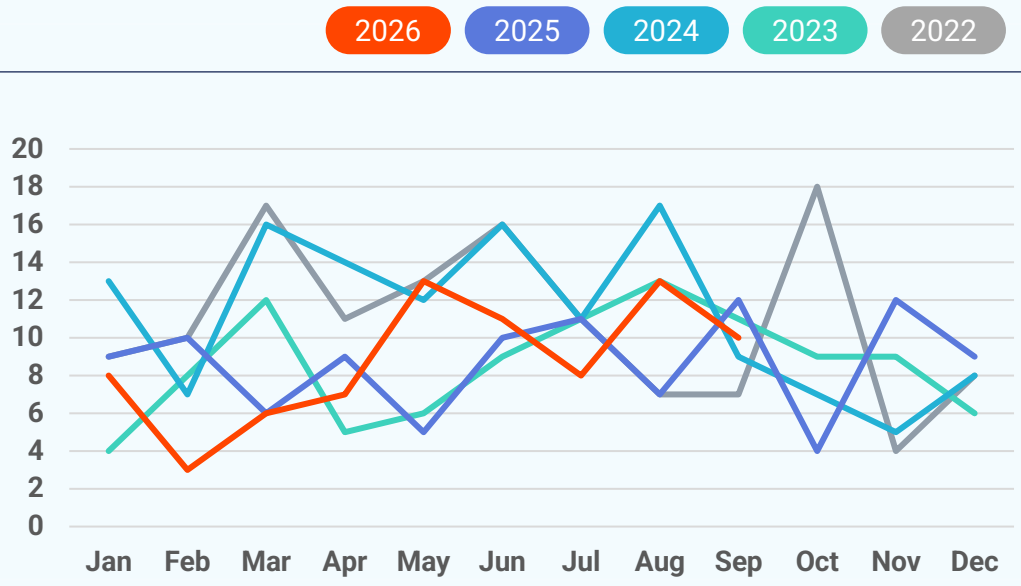
Key Market Statistics	Sep 2026	Sep 2025	Change
Closed Sales	10	12	-16.7%
Median Sold Price	$302,000	$290,000	+4.1%
Median Days on Market	28 days	60 days	-32 days
New Pending Sales	11	12	-8.3%
New Listings	11	12	-8.3%
Active Listings	19	24	-20.8%
Months of Supply	2.11	3.00	-0.89 mos.

Closed Sales

10
September 2026

-16.7%
Sep '26 vs. Sep '25
(Sep '25: 12)

-23.1%
Sep '26 vs. Aug '26
(Aug '26: 13)



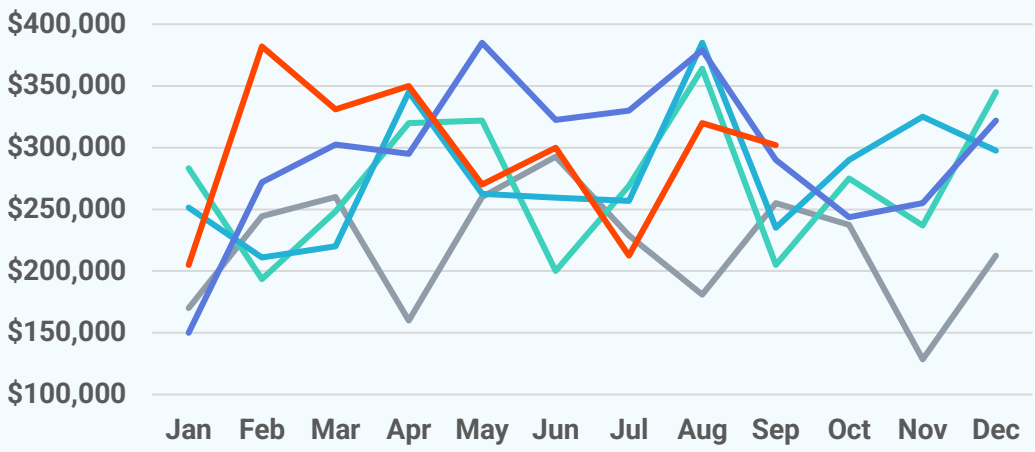
Median Sold Price

2026 2025 2024 2023 2022

$302,000
September 2026

+4.1%
Sep '26 vs. Sep '25
(Sep '25: $290,000)

-5.6%
Sep '26 vs. Aug '26
(Aug '26: $320,000)



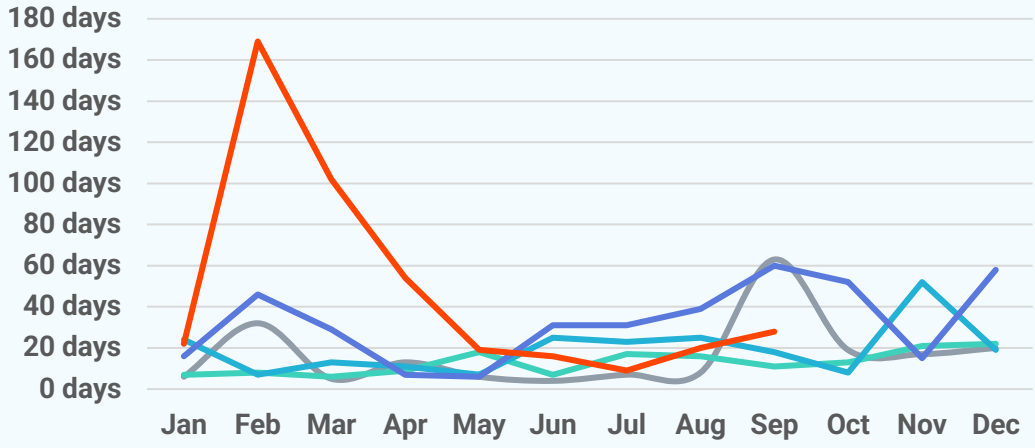
Median Days on Market

2026 2025 2024 2023 2022

28 days
September 2026

-32 days
Sep '26 vs. Sep '25
(Sep '25: 60 days)

+8 days
Sep '26 vs. Aug '26
(Aug '26: 20 days)



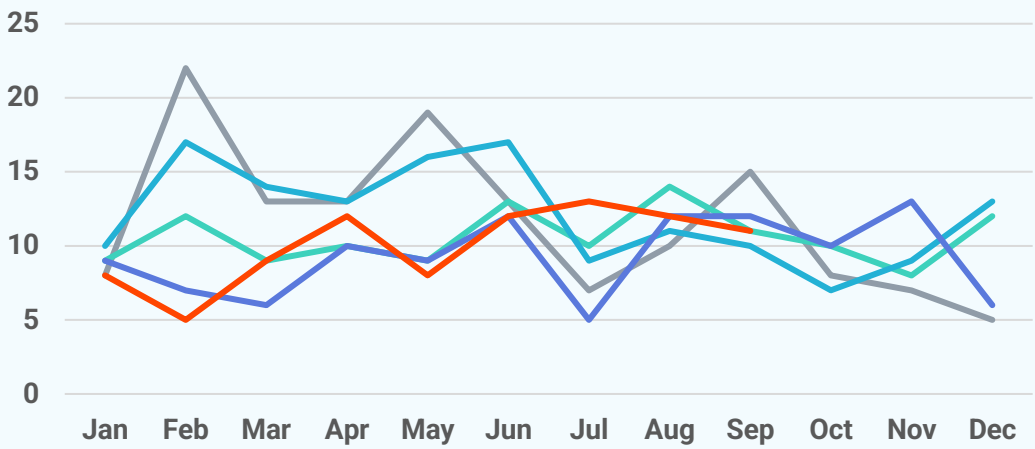
New Pending Sales

2026 2025 2024 2023 2022

11
September 2026

-8.3%
Sep '26 vs. Sep '25
(Sep '25: 12)

-8.3%
Sep '26 vs. Aug '26
(Aug '26: 12)



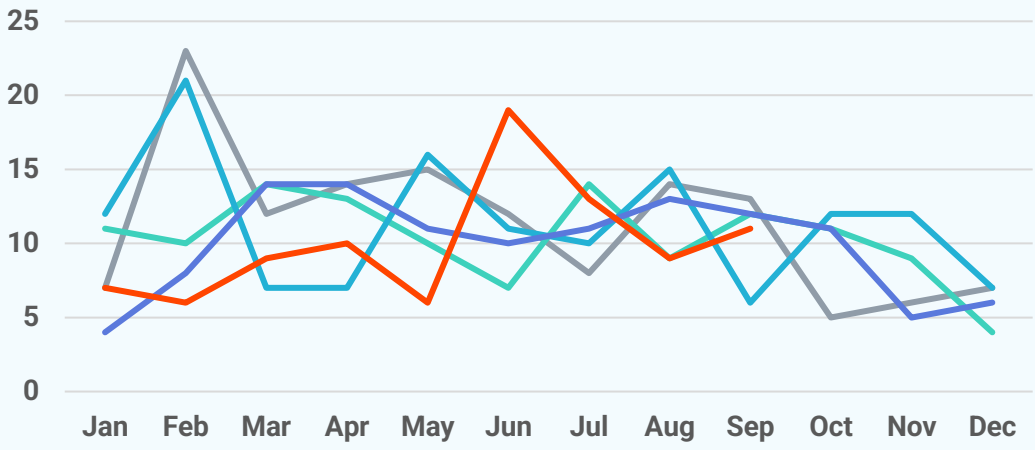
New Listings

2026 2025 2024 2023 2022

11
September 2026

-8.3%
Sep '26 vs. Sep '25
(Sep '25: 12)

+22.2%
Sep '26 vs. Aug '26
(Aug '26: 9)



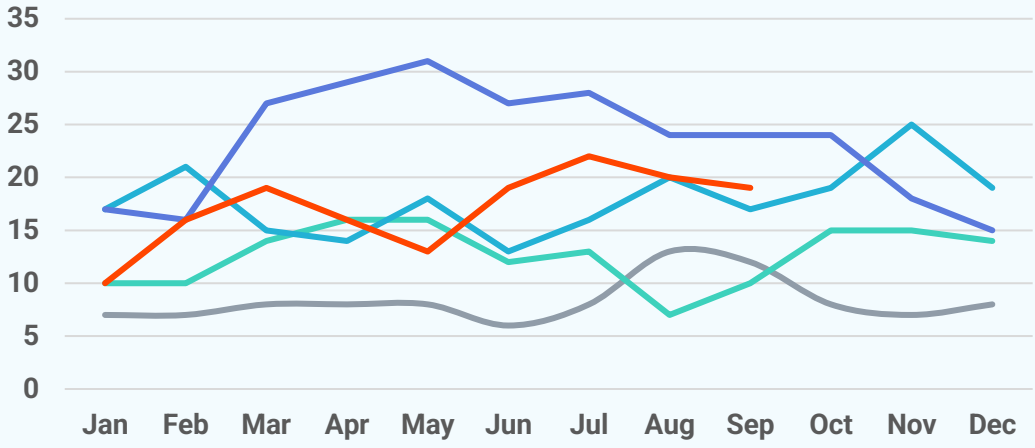
Active Listings

2026 2025 2024 2023 2022

19
September 2026

-20.8%
Sep '26 vs. Sep '25
(Sep '25: 24)

-5.0%
Sep '26 vs. Aug '26
(Aug '26: 20)



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