

Lake Nona Area Single-Family Market Report

October 2026

REPORT PERIOD	CURRENT INVENTORY SNAPSHOT	PROPERTY TYPE
September 1, 2025 - September 30, 2026	October 26, 2026	Single Family Homes

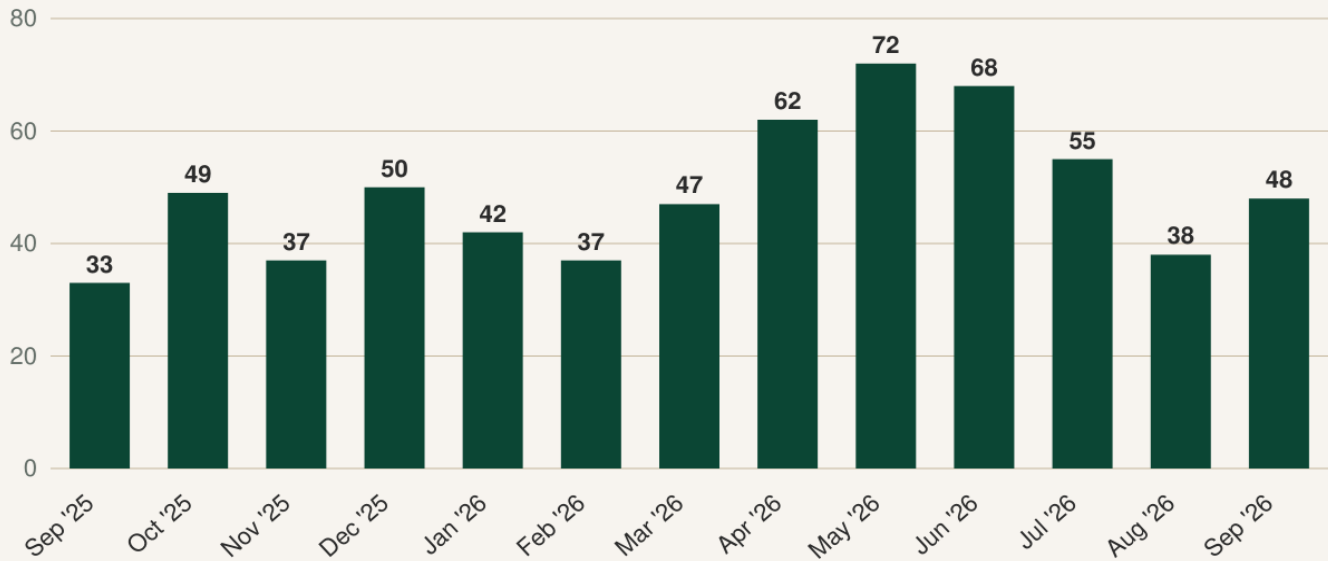
Market in one sentence

In the Lake Nona Area market, Real Buyer activity was 30.9% higher in the latest six months than in the previous six, although monthly activity remains below its May peak. The median sale price was 2.3% lower.

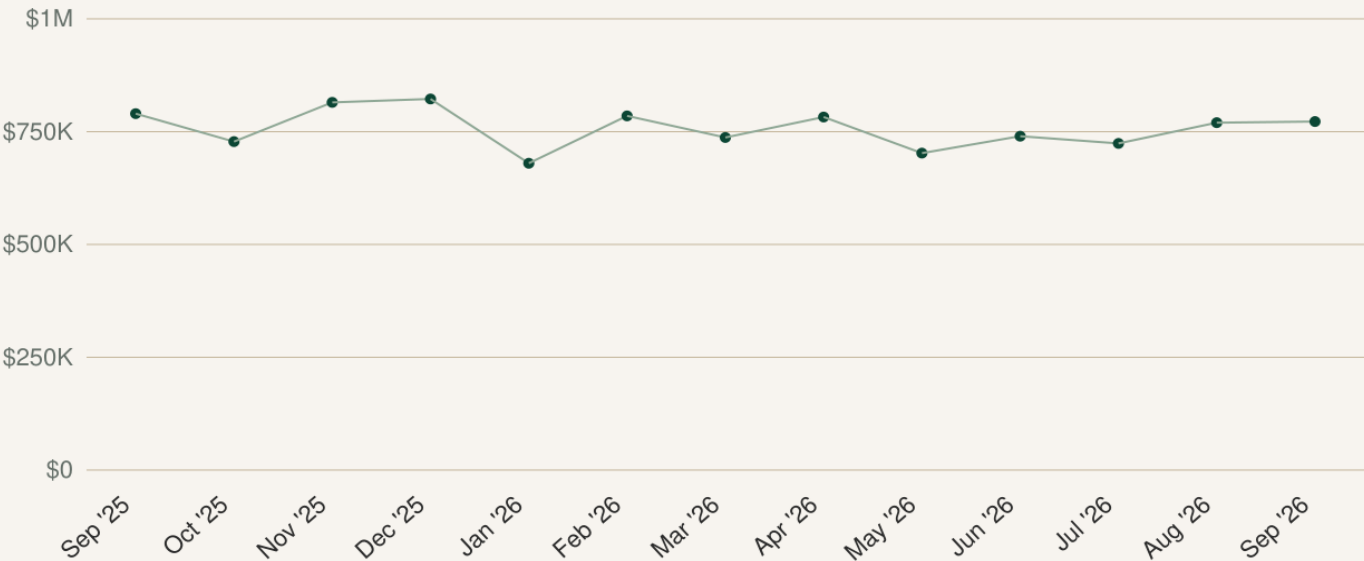
Real Buyers 638	Current Listings 245	Pending Listings 45	Months of Supply 4.9
Median Sale Price \$750,000	Median Sold \$/SF \$284.03	Median Days to Contract 44	Cash Transactions 20.7%

What is changing

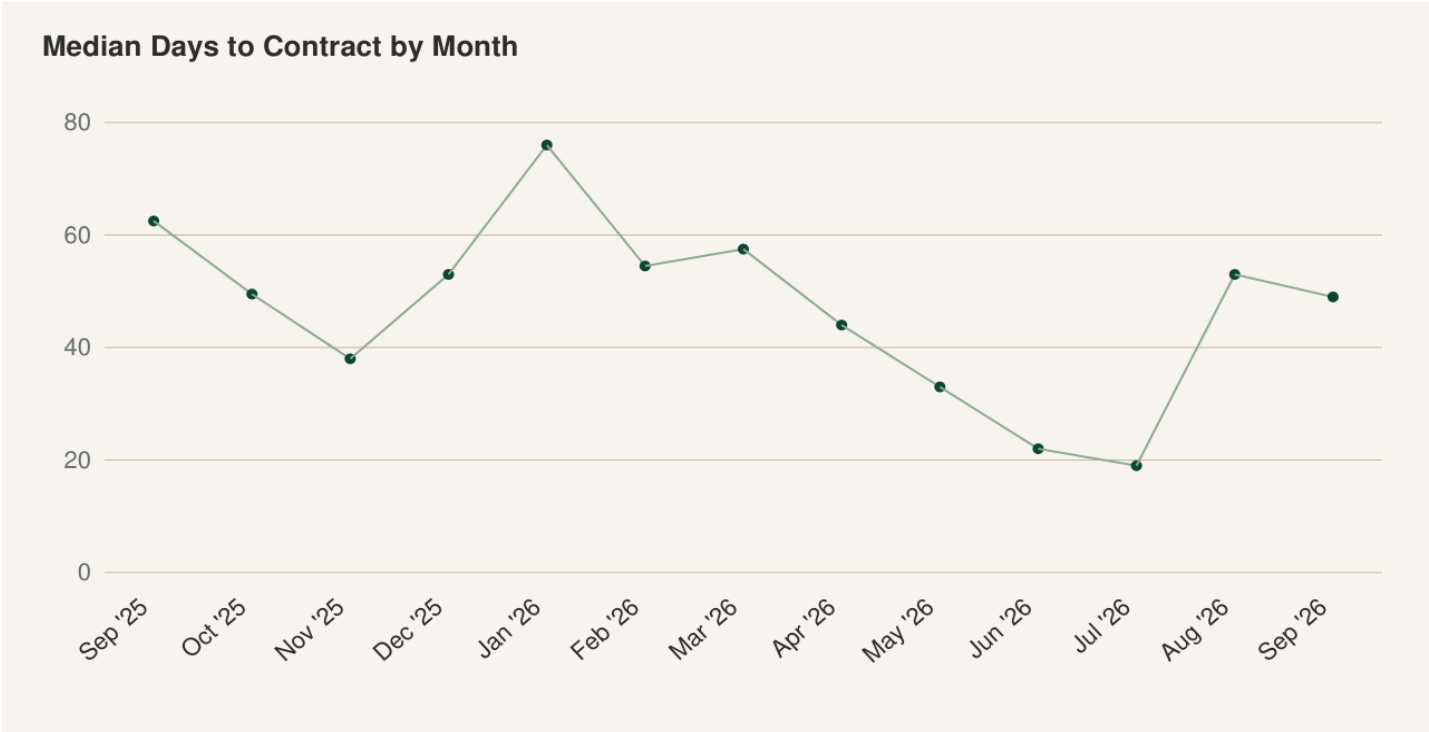
Real Buyers by Month



Median Sale Price by Month



What is changing



Latest 6 Months vs Previous 6 Months

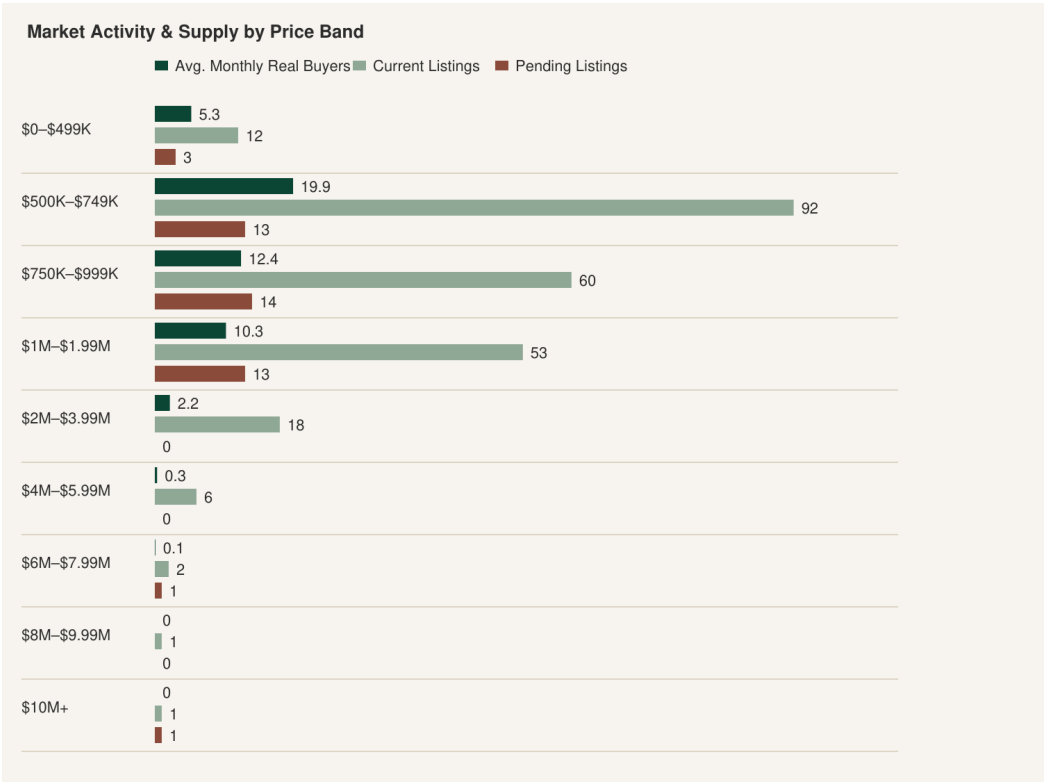
Metric	Previous	Latest	Change
Real Buyers	262	343	↑ +30.9%
Median Sale Price	\$757,500	\$740,000	↓ 2.3%
Median Sold \$/SF	\$288.21	\$283.43	↓ 1.7%
Median Days to Contract	52	35	↓ 17.0 days
Median Sale Price / Last List Price	98.0%	98.0%	→ +0.0 pt
Cash Share	22.9%	17.8%	↓ 5.1 pt

Market depth

Where the buyers are

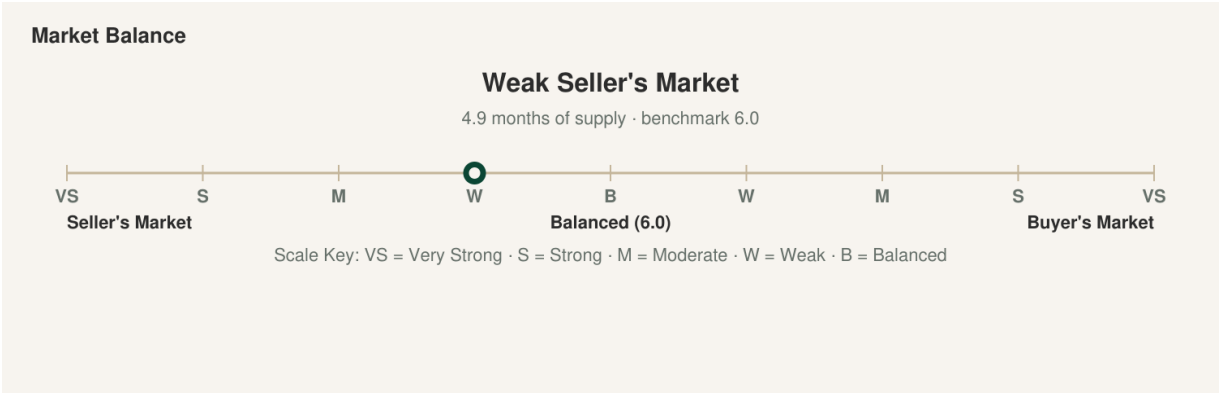
Price Band	Real Buyers	Current	Pending	Monthly Pace	Supply
\$0-\$499K	68	12	3	5.3	2.3
\$500K-\$749K	248	92	13	19.9	4.6
\$750K-\$999K	159	60	14	12.4	4.8
\$1M-\$1.99M	130	53	13	10.3	5.2
\$2M-\$3.99M	27	18	0	2.2	8.3
\$4M-\$5.99M	5	6	0	0.3	18.0
\$6M-\$7.99M	1	2	1	0.1	24.0
\$8M-\$9.99M	0	1	0	0.0	N/A
\$10M+	0	1	1	0.0	N/A

Market Activity & Supply by Price Band

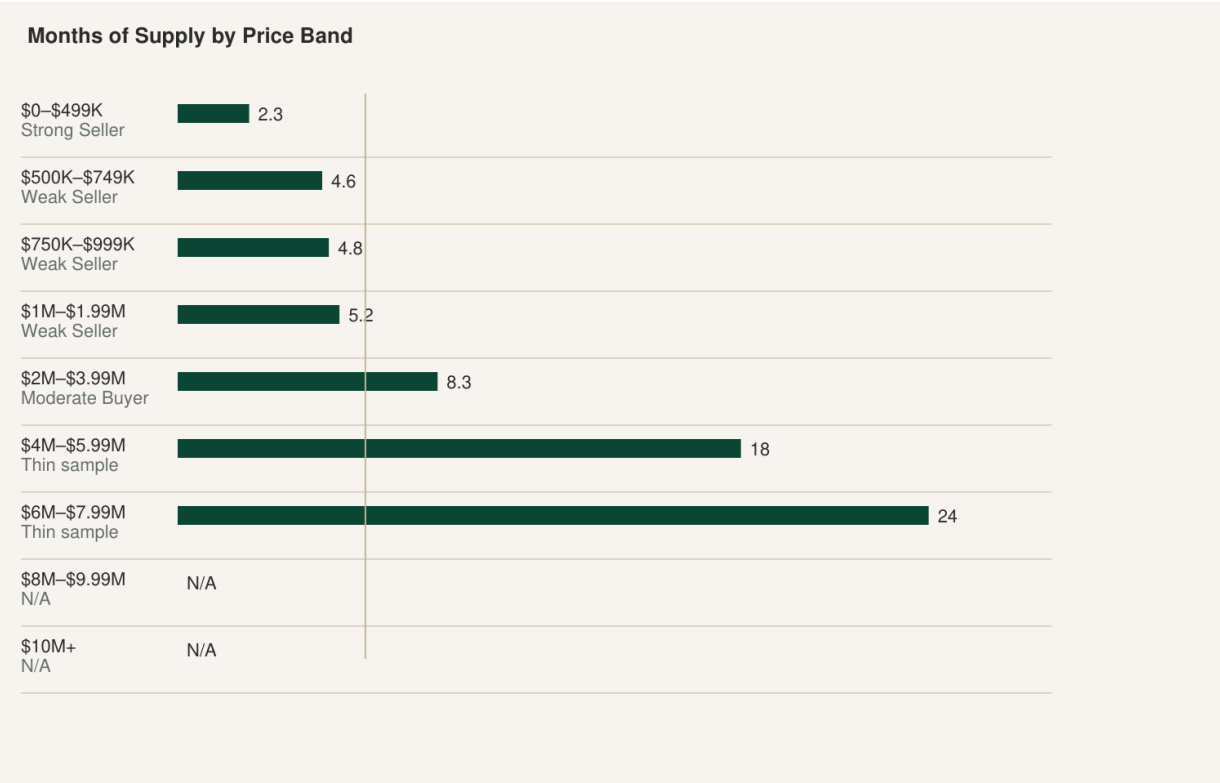


Market depth

Market Balance

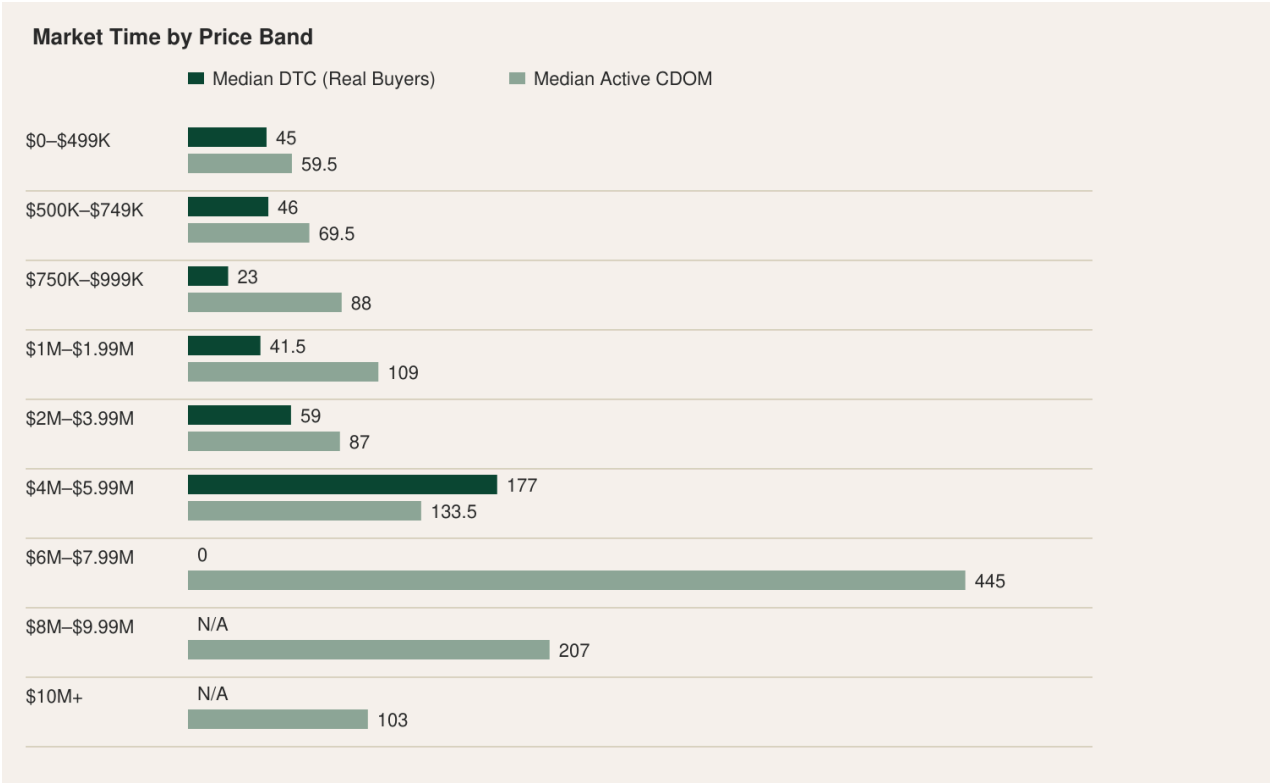


Months of Supply by Price Band



Market depth

Market Time by Price Band



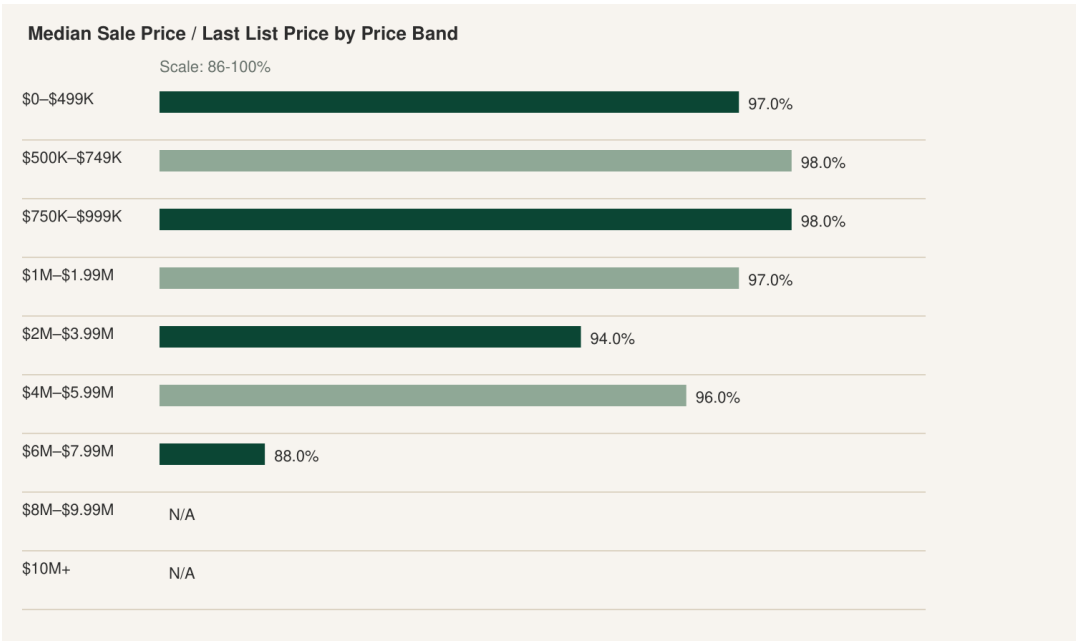
Closed-sale behavior

How transactions are clearing

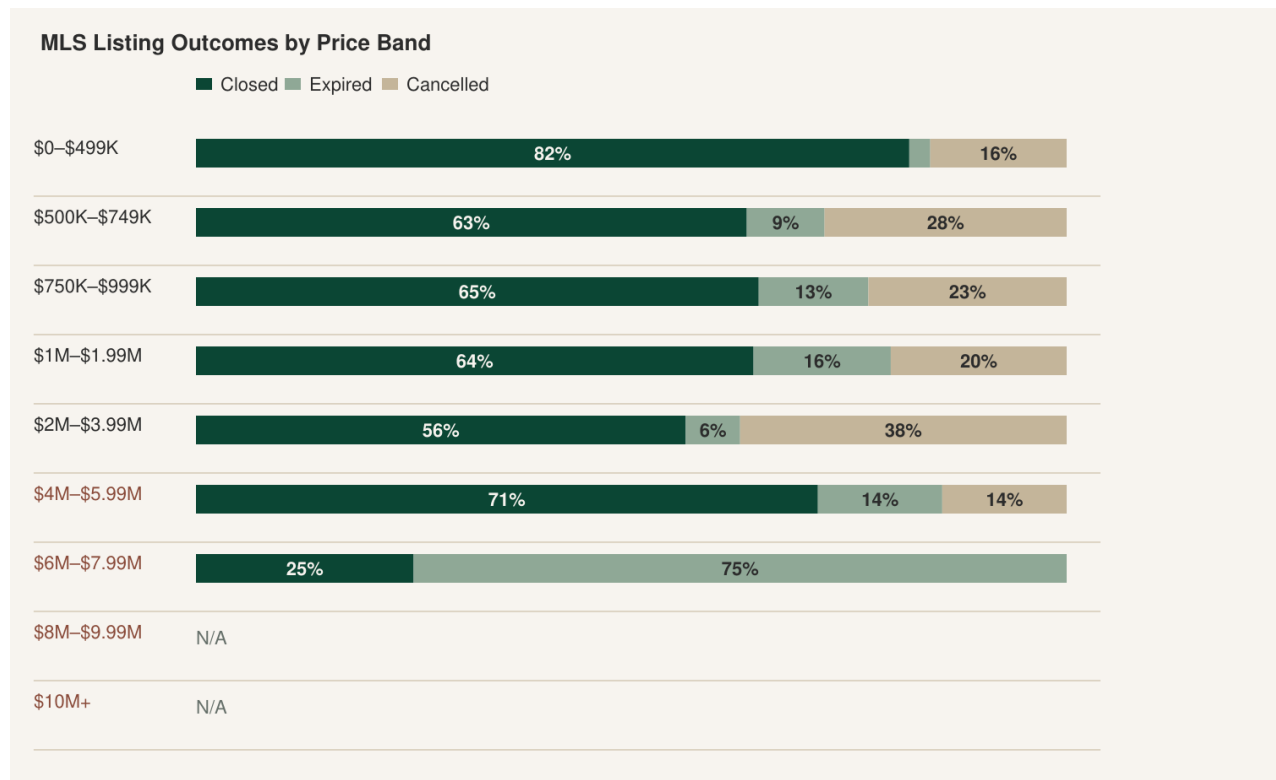
Price Band	Median Sale	Sold \$/SF	DTC	Sale / Last List	Cash	Cash Share
\$0-\$499K	\$460,000	\$233.16	45	97.0%	16	23.5%
\$500K-\$749K	\$637,000	\$268.55	46	98.0%	42	16.9%
\$750K-\$999K	\$855,000	\$277.75	23	98.0%	26	16.4%
\$1M-\$1.99M	\$1,300,000	\$346.46	41.5	97.0%	33	25.4%
\$2M-\$3.99M	\$2,600,000	\$577.91	59	94.0%	12	44.4%
\$4M-\$5.99M	\$4,395,000	\$775.71	177	96.0%	2	40.0%
\$6M-\$7.99M	\$6,600,000	\$800.49	0	88.0%	1	100.0%
\$8M-\$9.99M	N/A	N/A	N/A	N/A	0	N/A
\$10M+	N/A	N/A	N/A	N/A	0	N/A

Higher price bands are based on smaller transaction samples and should be read cautiously.

Median Sale Price / Last List Price by Price Band



MLS Listing Outcomes



What the outcomes show

Observed MLS listing outcomes are not probabilities and may include more than one record for the same property. Among price bands with sufficient sample depth, the highest share of closed outcomes was 82% below \$500,000, followed by 65% in the \$750,000 - \$999,999 range and 64% in the \$1,000,000 - \$1,999,999 range. At \$6M-\$7.99M, of 4 observed outcome records, 1 closed and 3 expired. With only 4 records, that result should be treated as a factual observation, not a failure rate or a prediction of future listing outcomes.

Methodology / Data notes

Lake Nona Area source export. Not a municipal boundary. Real Buyers: MLS closings within report dates.

The report uses 13 months of closed-sale data for full-period statistics and monthly trend context. Months of Supply uses the monthly pace of Real Buyers in the latest 12 complete calendar months within that 13-month window.

Market Balance classifications use the DANHOLM COLLECTION framework centered on a 6.0-month balanced-market benchmark and are derived from unrounded Months of Supply.

Contiguous empty price bands below the lowest occupied band and above the highest occupied band are omitted from presentation; internal zero bands remain visible.

MLS Listing Outcomes summarize observed SLD, EXP, and CAN records; they are not probabilities and may include more than one record for the same property.

Current Listings include only records with strict ACT status; pending statuses are reported separately.

Months of Supply equals ACT listings divided by that monthly pace (ACT / monthly pace).

Price bands use lower-inclusive and upper-exclusive boundaries; the final \$10,000,000+ band is open-ended.

Medians ignore missing or invalid values and average the two middle observations for even samples.