DANHOLM COLLECTION

Lake Nona Area Single-Family Market Report

August 2026

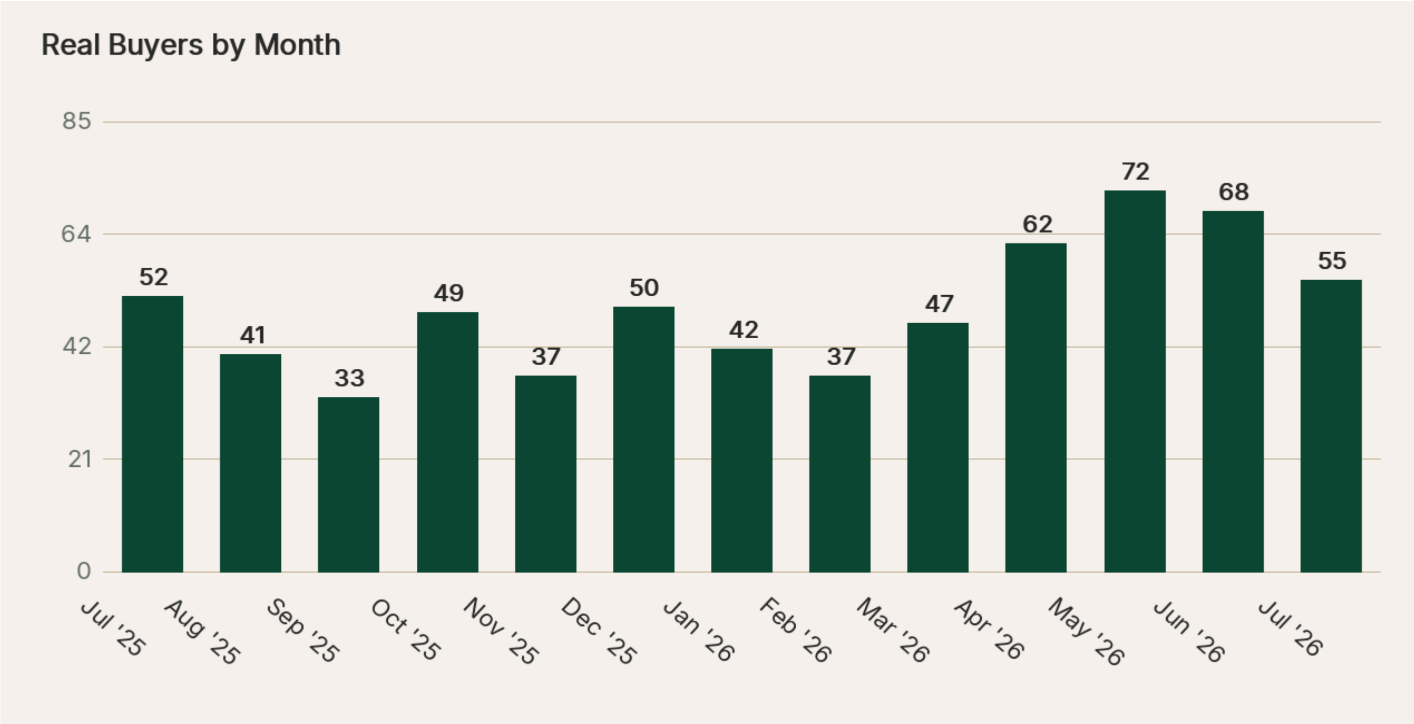
Market in one sentence

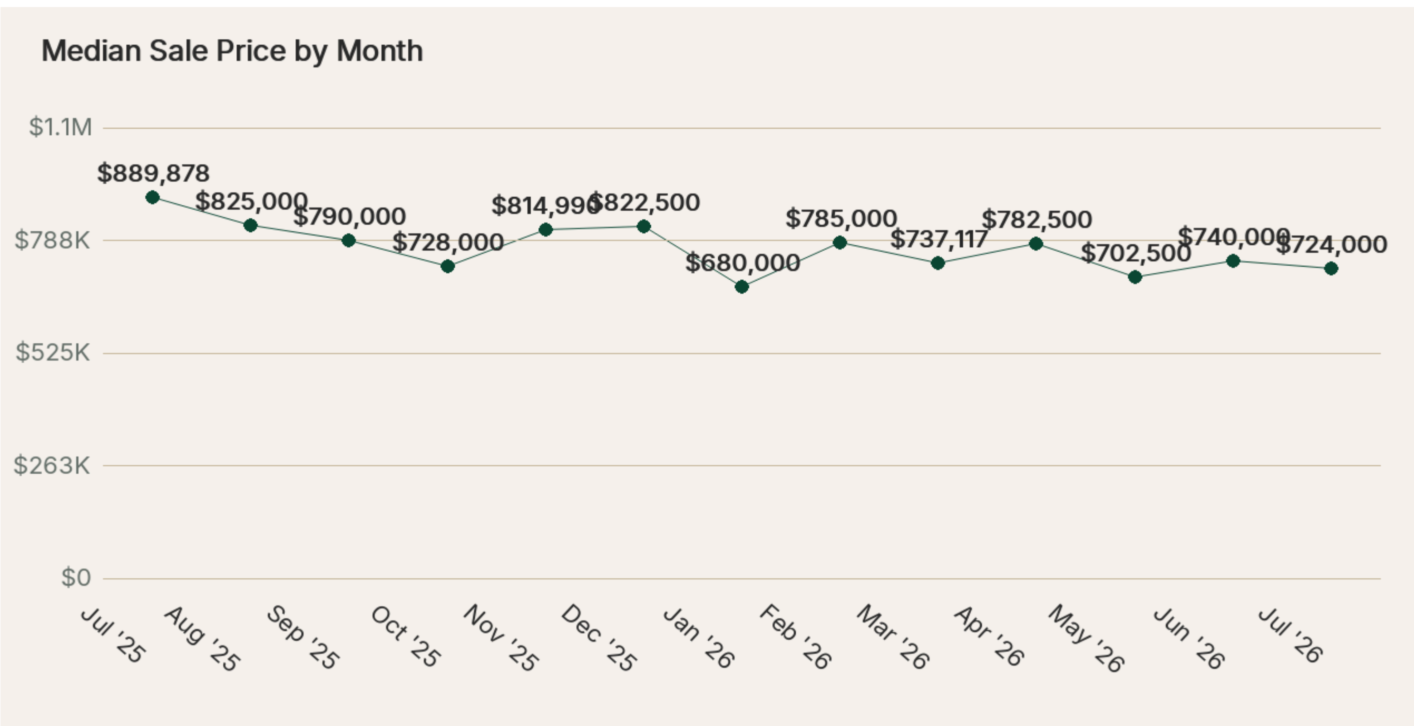
The Lake Nona single-family market shows a clear upshift in demand with real buyers rising to 341 in the latest six months, while average prices and days-to-contract compress, signaling tighter competition in a generally balanced price trajectory.

Real Buyers	Current Listings	Pending Listings	Months of Supply
645	229	70	4.6

Median Sale Price	Median Sold $/SF	Median Days to Contract	Cash Transactions
$755,000	$283.43	45	20.9%

What is changing





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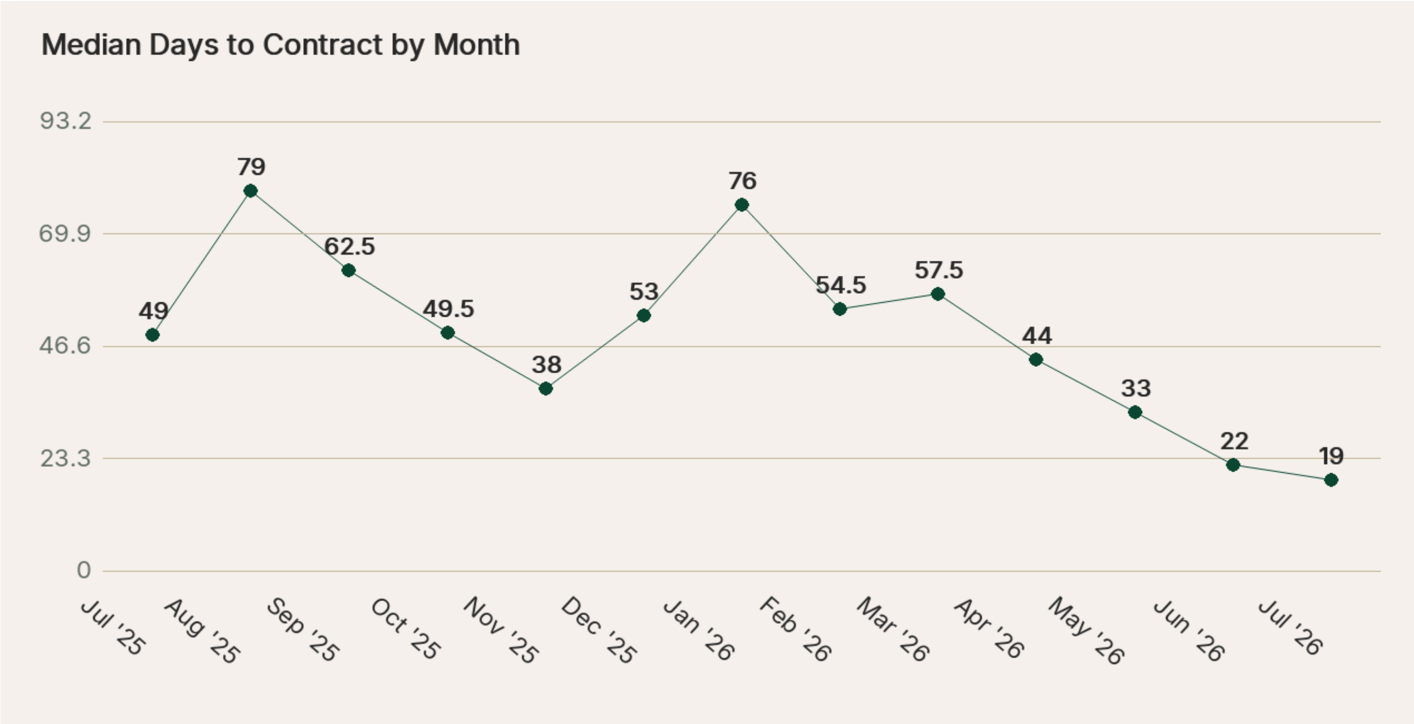


Latest 6 Months vs Previous 6 Months

Metric	Previous	Latest	Change
Cash Share	21.0%	21.1%	→ +0.1 pt
Real Buyers	252	341	↑ +35.3%
Median Sold $/SF	$280.93	$283.88	↑ +1.1%
Median Sale Price	$772,500	$734,434	↓ −4.9%
Median Sale Price / Last List Price	97.0%	98.0%	↑ +1.0 pt
Median Days to Contract	58.5	31	↓ 27.5 days

Market depth

Where the buyers are

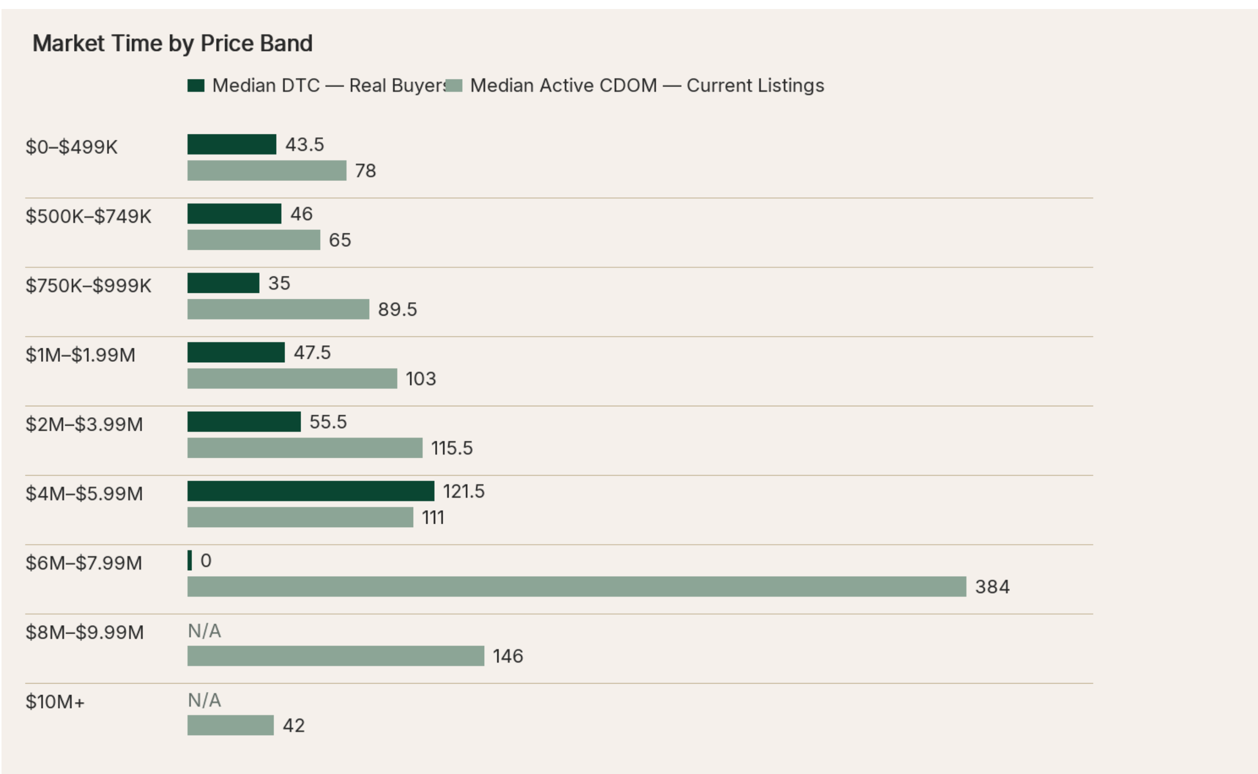
Price Band	Real Buyers	Current	Pending	Pace	Supply
$0–$499K	64	10	4	5.2	1.9
$500K–$749K	247	80	26	19.3	4.2
$750K–$999K	163	56	13	12.4	4.5
$1M–$1.99M	138	55	21	10.0	5.5
$2M–$3.99M	26	18	3	2.0	9.0
$4M–$5.99M	6	5	1	0.5	10.0
$6M–$7.99M	1	3	1	0.1	36.0
$8M–$9.99M	0	1	0	0.0	—
$10M+	0	1	1	0.0	—

Market Activity & Supply by Price Band

Market depth

Months of Supply by Price Band

Market Time by Price Band



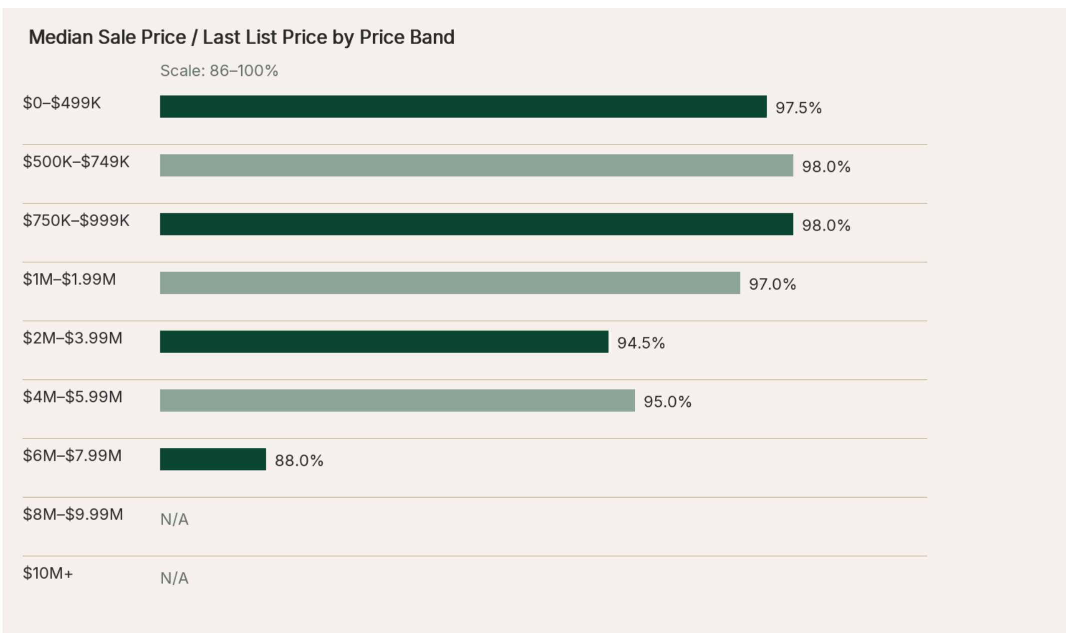
Closed-sale behavior

How transactions are clearing

Price Band	Median Sale	Sold $/SF	DTC	Sale / Last List	Cash	Cash Share
$0–$499K	$460,000	$233.18	43.5	97.5%	15	23.4%
$500K–$749K	$640,000	$268.30	46	98.0%	44	17.8%
$750K–$999K	$850,000	$275.59	35	98.0%	27	16.6%
$1M–$1.99M	$1,300,000	$337.37	47.5	97.0%	35	25.4%
$2M–$3.99M	$2,662,500	$527.94	55.5	94.5%	10	38.5%
$4M–$5.99M	$4,360,000	$762.47	121.5	95.0%	3	50.0%
$6M–$7.99M	$6,600,000	$800.49	0	88.0%	1	100.0%
$8M–$9.99M	—	—	—	—	0	—
$10M+	—	—	—	—	0	—

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

Median Sale Price / Last List Price by Price Band



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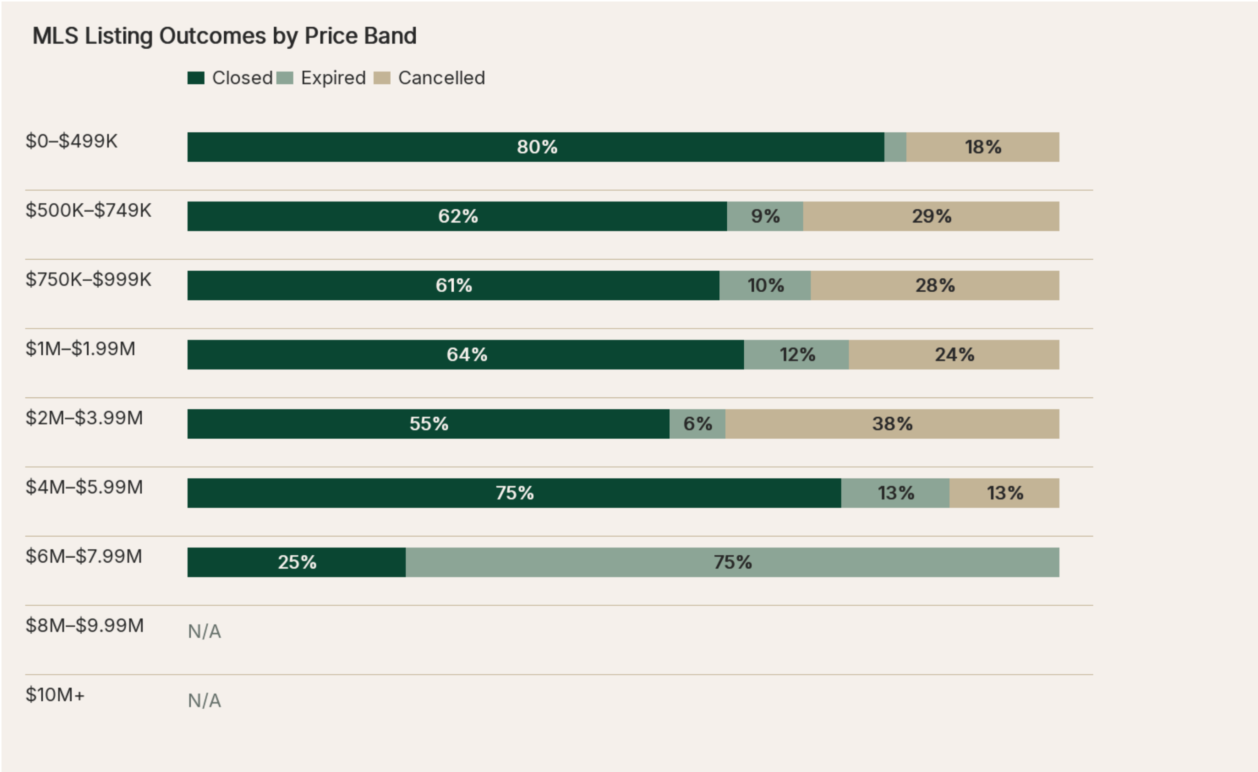
MLS Listing Outcomes



What the outcomes show

MLS listing outcomes across usable listing records: $0 - $499,999 cleared a comparatively high share of listings into closed sales; $500,000 - $749,999 cleared a comparatively high share of listings into closed sales; $750,000 - $999,999 cleared a comparatively high share of listings into closed sales. Those thin samples ($6,000,000 - $7,999,999) are factual counts only.

Bent's analysis

What the Numbers Mean

The data indicate a meaningful shift in buyer activity over the past six months: Real Buyers rose from 252 to 341 (up 35%), suggesting stronger demand. Median sale price declined modestly from $772,500 to $734,434, a dip of about 4.9%, while median sold price per square foot edged up to $283.88, and median days to contract shortened from 58.5 to 31 days, pointing to faster closings. The sale-price-to-list-price ratio improved slightly from 97% to 98%, consistent with price discipline in a competitive market. Cash transactions remained around 21%, indicating a steady but not dominant cash presence as financing remains central. Price-band signals show the strongest activity in the $500k-$749,999 and $750k-$999,999 bands, with thinner activity in the upper tiers, suggesting buyers are securing homes efficiently in mid-to-upper-mid ranges. Broader signals are supported by the six-month change in the six bands, while thin-sample bands should be read cautiously.

For Sellers

Sellers in the core $500k-$749,999 and $750k-$999,999 bands face competitive pressure from a rising pool of real buyers and faster closings, requiring pricing discipline and readiness to negotiate. The market shows solid liquidity in these bands (months of supply around 4.2-4.5), but risk remains in thinner upper bands where activity is slower (e.g., $4,000,000-$5,999,999 months of supply 10). Sellers should avoid overpricing given the tight sale price / last list price drift toward 0.98 and the shrinking days-to-contract signal, and consider pricing that invites quick offers to reduce exposure.

For Buyers

Buyers have stronger negotiating leverage in the lower-end to mid-range ($0-$499,999 and $500k-$749,999) due to higher active counts and steady supply, but competition is intensifying there as well given rising real buyers. In the $750k-$999,999 band and higher, competition remains solid but more balanced with faster closings; the high end ($2,000,000-$3,999,999) shows thinner activity with longer time on market, suggesting a cautious approach and longer due diligence for buyers in those tiers. Overall, a price discipline trend is evident (sale price / last list price near 0.98) and buyers should be prepared to act quickly with credible offers in the bands showing tighter supply.

Methodology / Data notes

Real Buyers are closed MLS listings with a valid Close Date inside the inclusive report period.

Current Listings count strict ACT status only; pending statuses are reported separately.

Months of Supply equals ACT listings divided by the monthly pace of closed buyers in the latest 12 calendar months.

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.

MLS Listing Outcomes summarize observed SLD, EXP, and CAN records; they are not probabilities.