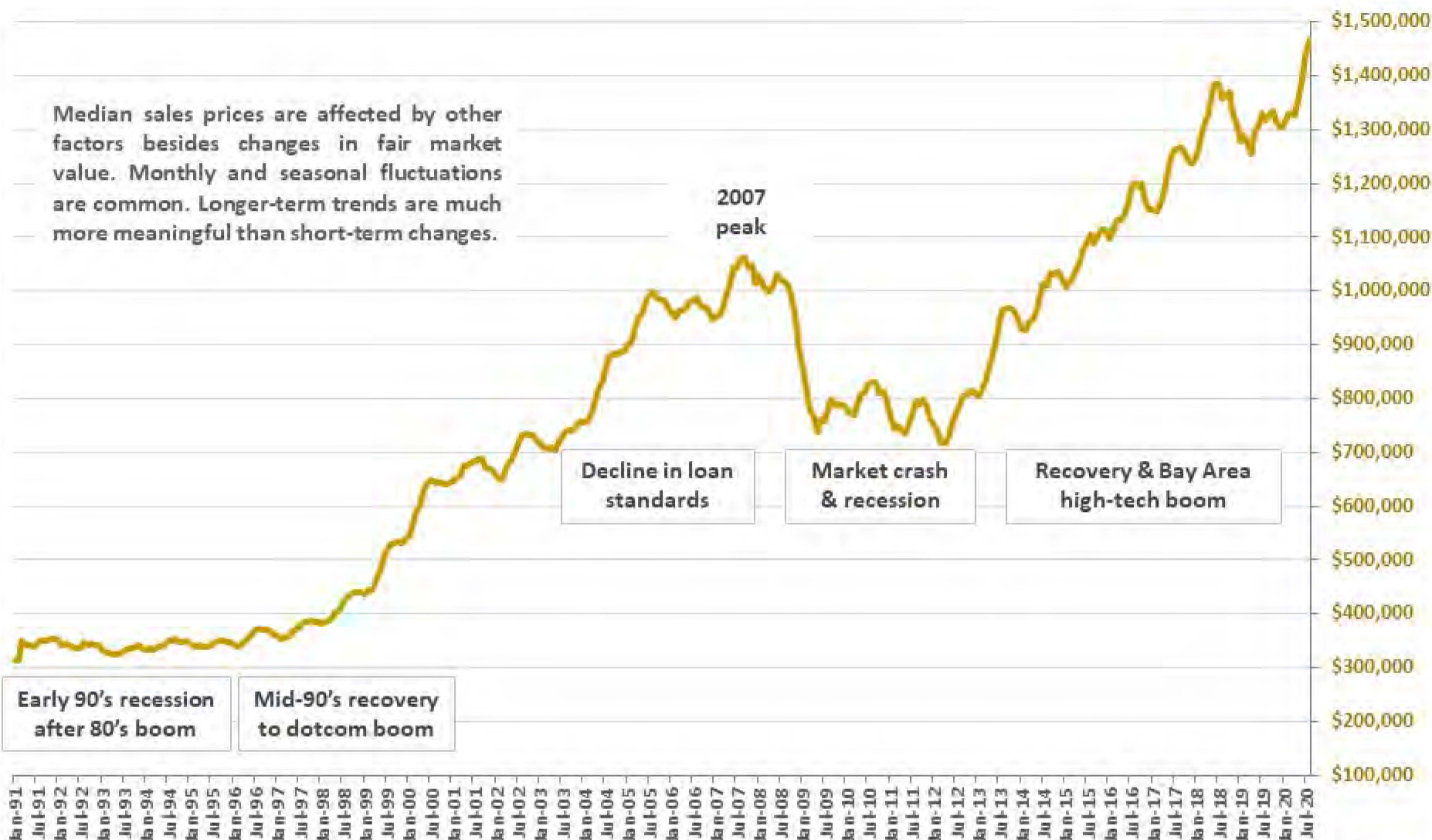


Marin County Home Price Appreciation since 1991

Monthly Median House Sales Prices, 6-Month Rolling Average

Sales reported to MLS
through 8/31/20



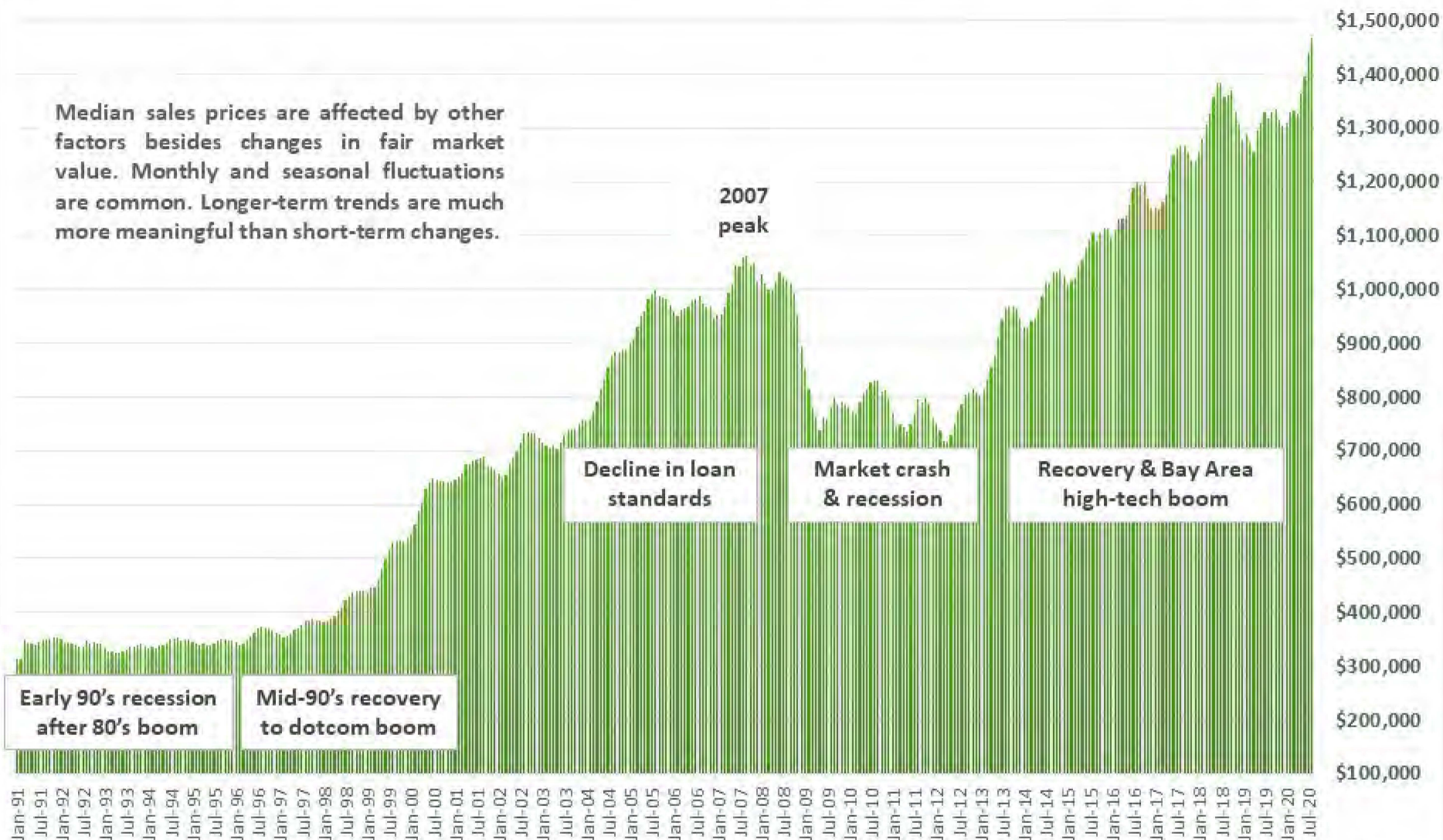
6-month rolling average of monthly median sales prices for "existing" houses, per CA Association of Realtors, MLS and Broker Metrics. Analysis may contain errors and subject to revision. All numbers are approximate.

COMPASS

Marin County Home Price Appreciation since 1991

Monthly Median House Sales Prices, 6-Month Rolling Average

Sales reported to MLS
through 8/31/20



6-month rolling average of monthly median sales prices for "existing" houses, per CA Association of Realtors, MLS and Broker Metrics. Analysis may contain errors and subject to revision. All numbers are approximate.

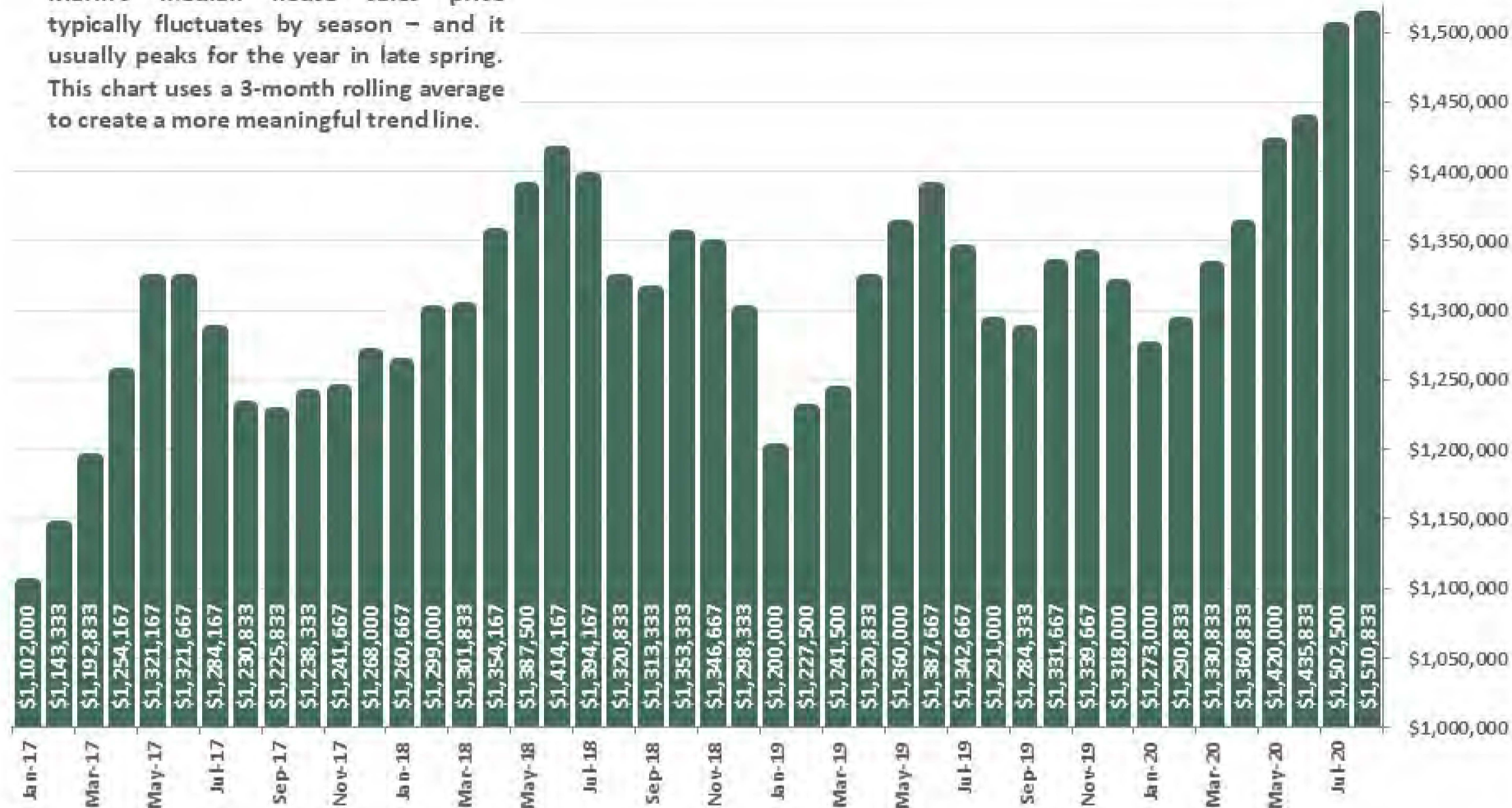
COMPASS

Marin Median House Values since 2017

3-Month Rolling Average of Monthly Median Sales Price

House sales reported to
MLS, per Broker Metrics

Marin's median house sales price typically fluctuates by season – and it usually peaks for the year in late spring. This chart uses a 3-month rolling average to create a more meaningful trend line.



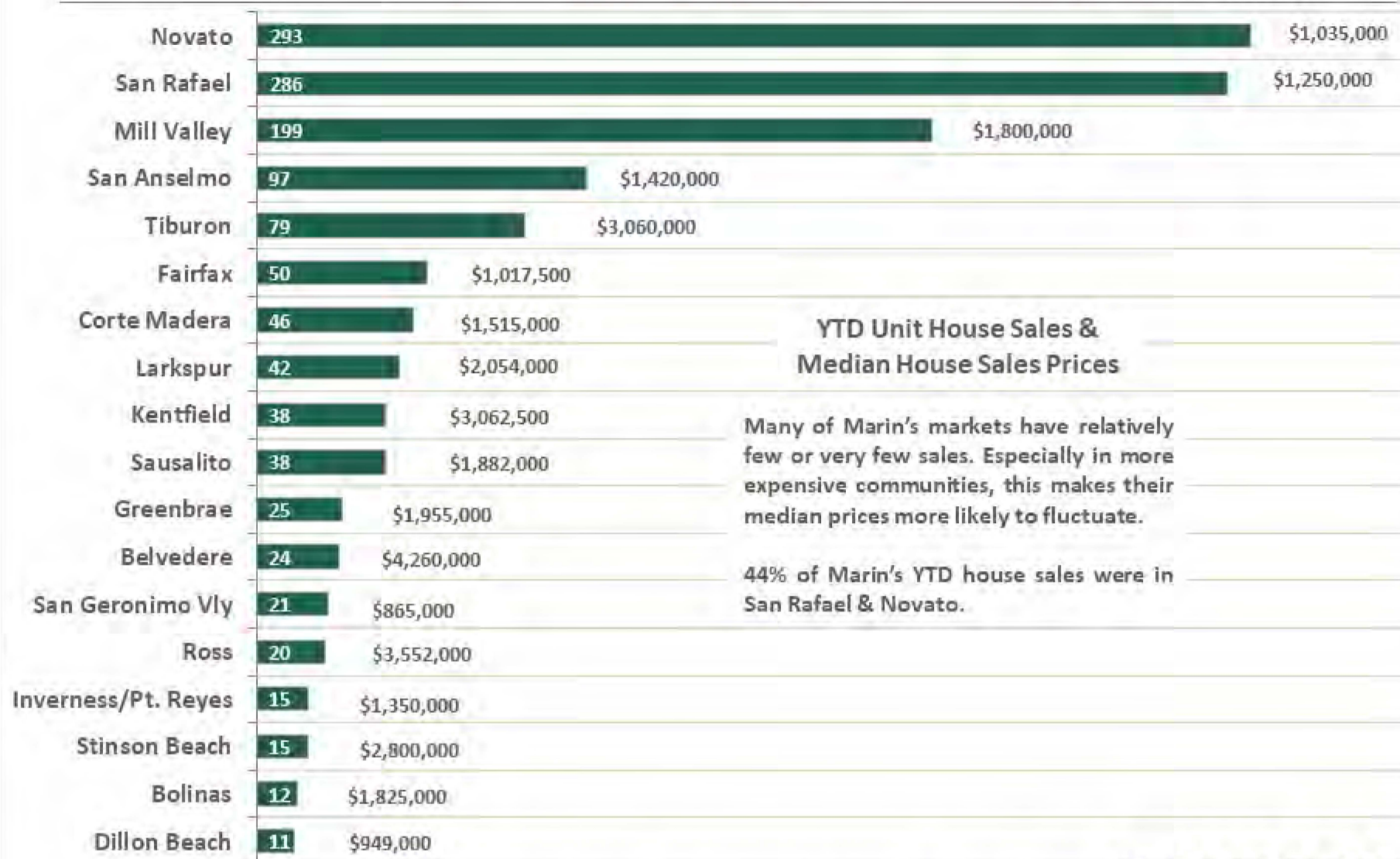
Median Prices can be affected by other factors besides changes in fair market value, such as seasonal trends and changes in the luxury and new-construction segments. Sales prices in one month generally reflect deals negotiated in the prior month or two. This analysis was performed in good faith with data derived from sources deemed reliable, but may contain errors and is subject to revision. Late reported sales may alter the last entry.

COMPASS

Marin County Real Estate Market

HOUSE Sales YTD 2020, Median House Sales Prices*

House sales reported to
MLS YTD 2020 by 8/24/20



YTD Unit House Sales & Median House Sales Prices

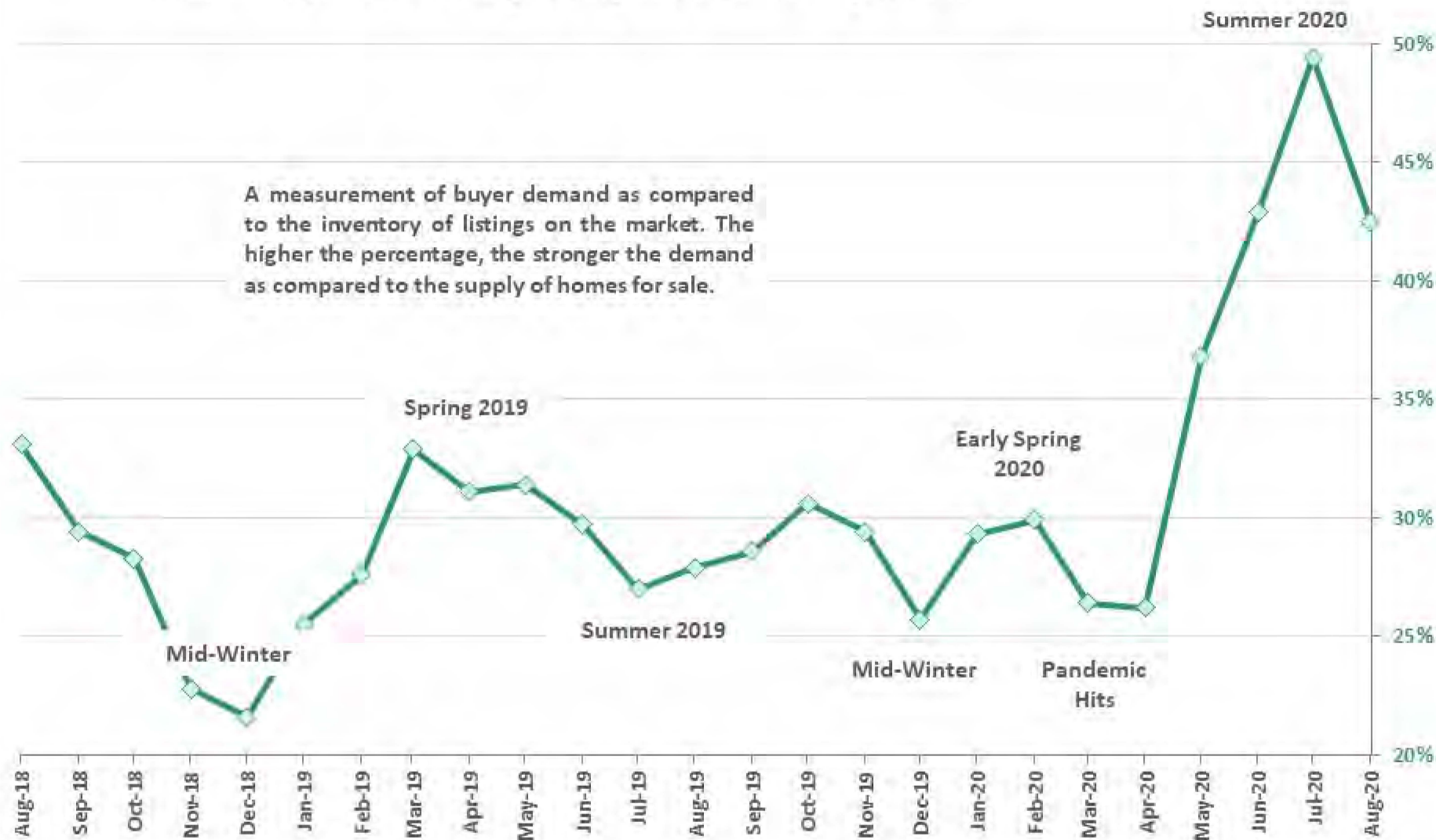
Many of Marin's markets have relatively few or very few sales. Especially in more expensive communities, this makes their median prices more likely to fluctuate.

44% of Marin's YTD house sales were in San Rafael & Novato.

* YTD sales reported to MLS by 8/24/20. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers are approximate.

Percentage of Listings Accepting Offers

Marin County: House Listings Going into Contract, by Month



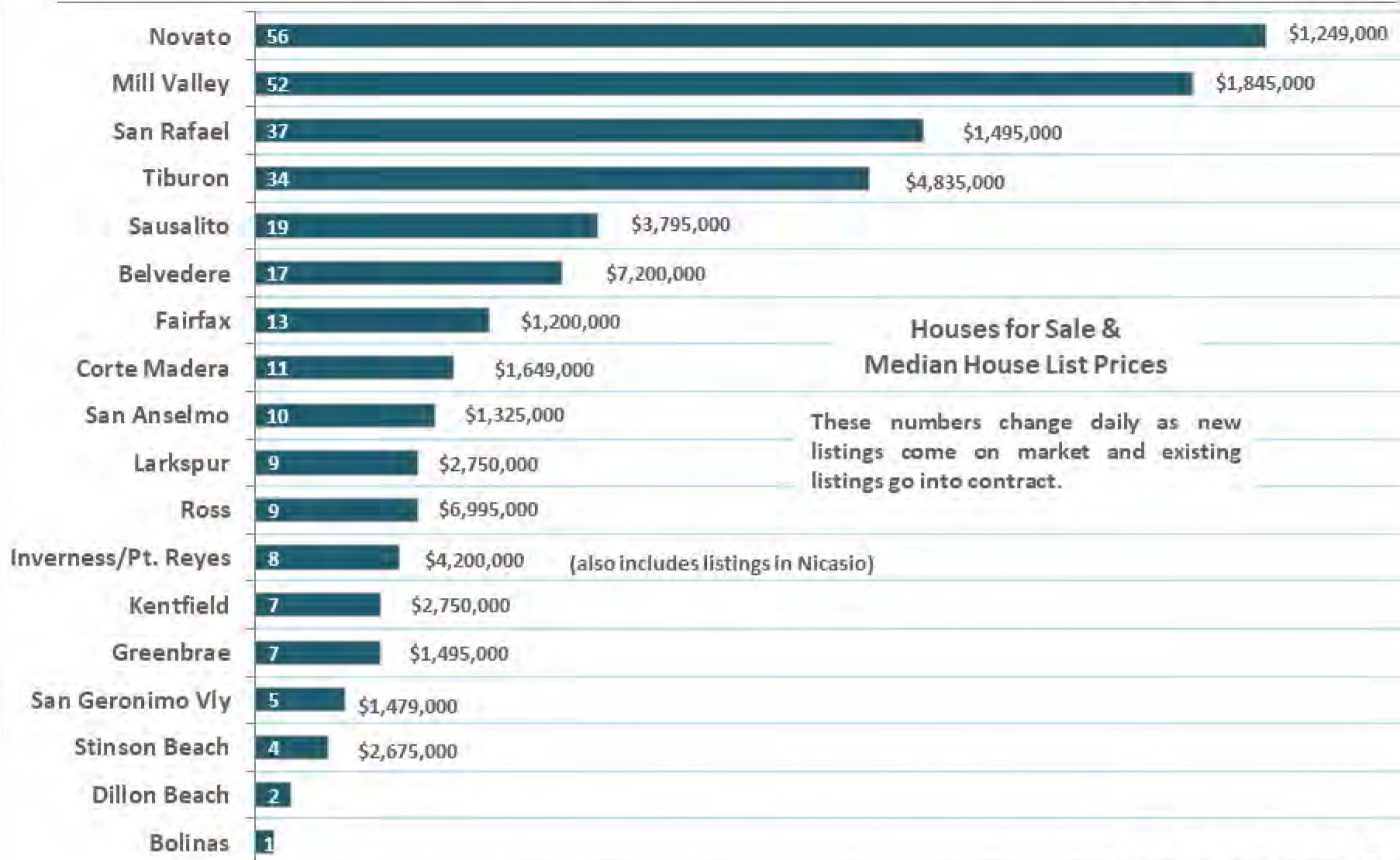
* MLS reported data, per Broker Metrics. Last month's data estimated using available data, may change with late reported activity. Data from sources deemed reliable but may contain errors and subject to revision. All numbers approximate.

COMPASS

Marin County Real Estate Market

ACTIVE House Listings on Market, Median ASKING Prices*

Listings posted as active or coming soon in MLS, 9/7/20



Houses for Sale & Median House List Prices

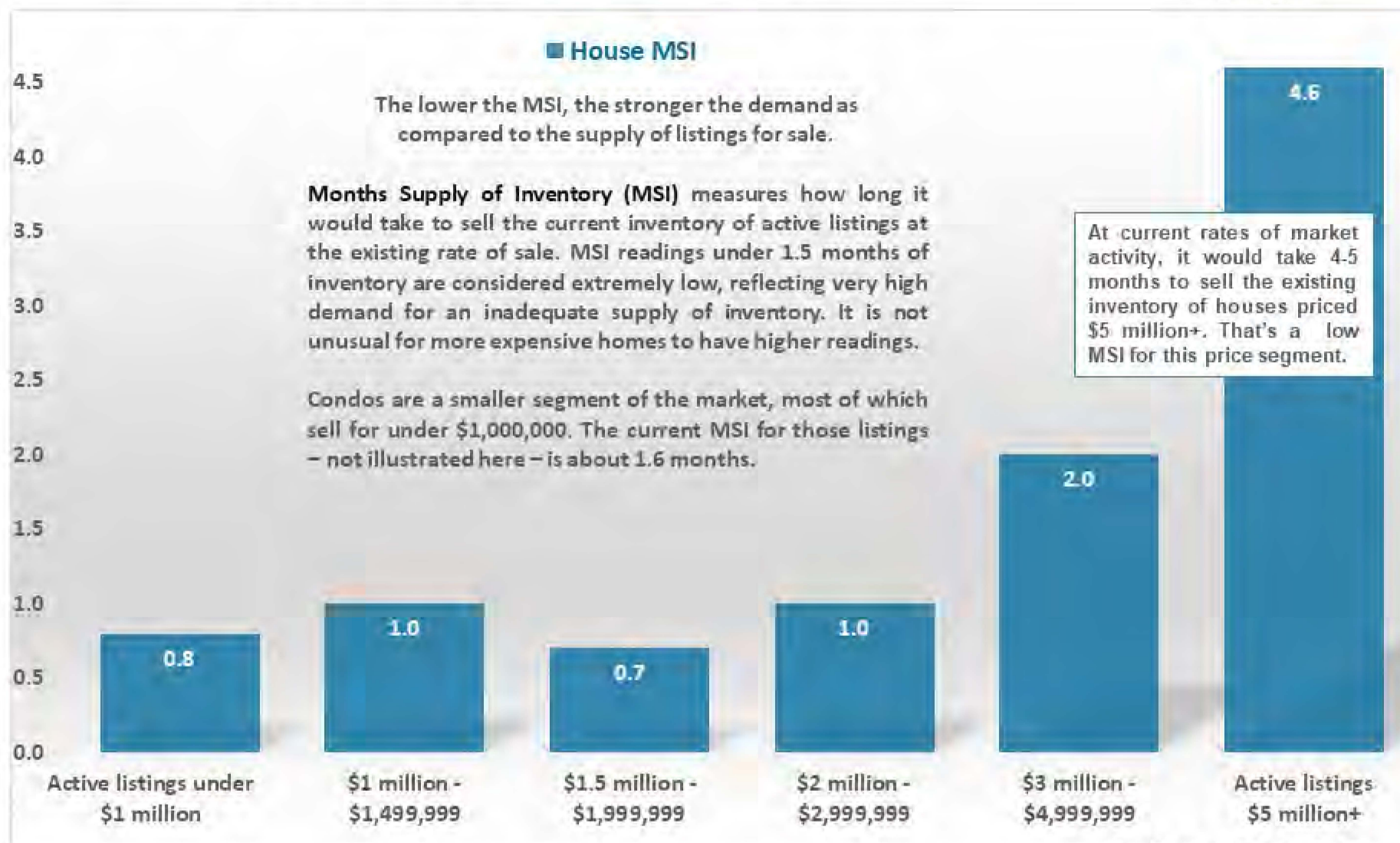
These numbers change daily as new listings come on market and existing listings go into contract.

* Active listings posted to MLS on 9/7/20. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers are approximate.

Marin County Supply & Demand

Months Supply of Inventory (MSI) by Price Segment, for Houses

Late August 2020
MLS analysis



Analysis of MLS listings and rate of sales in late August 2020. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers approximate.

COMPASS

Marin County Market Trends

New Listings & Listings Going into Contract, Year-over-Year Comparisons

Updated August 24, 2020
Rolling 28 day calculation

366

New Listings – Last 4 Weeks

Up 35% vs. Last Year

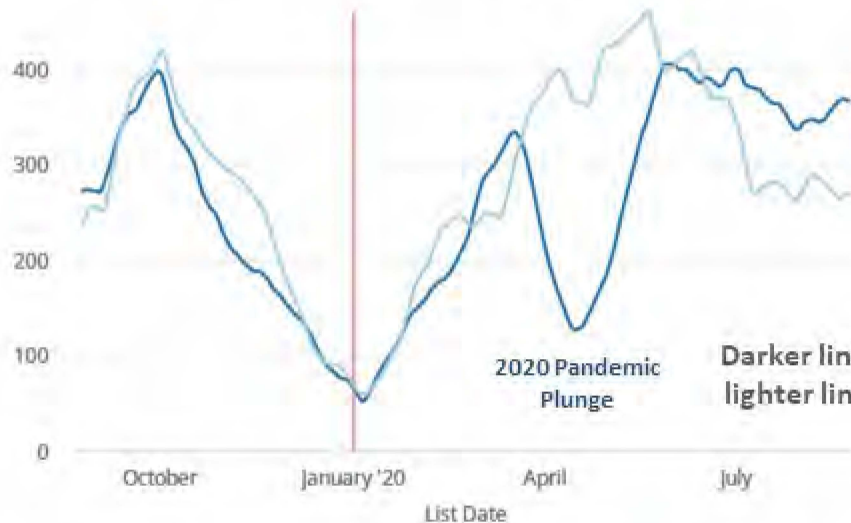
Activity typically surges in spring and declines in summer, but the pandemic changed that dynamic.

429

New Contracts – Last 4 Weeks

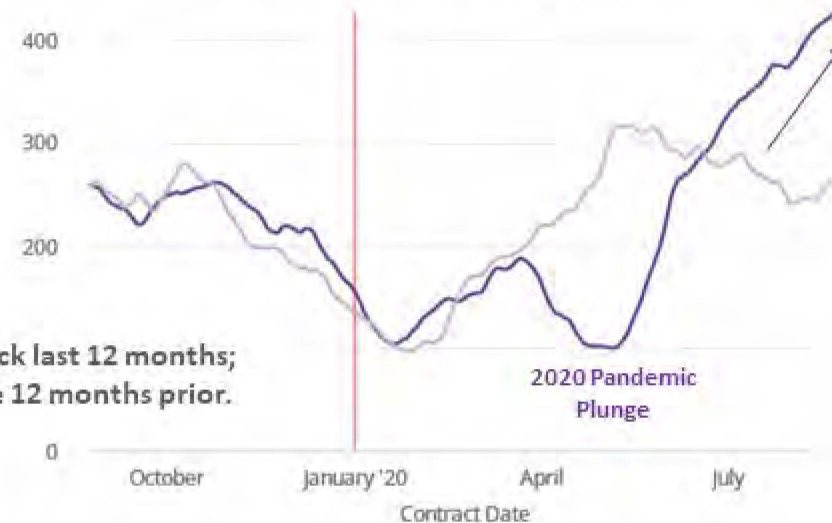
Up 65% vs. Last Year

New Listings - Trailing 4 Weeks



— New Listings - Last Year — New Listings - This Year ● Jan 1, 2020

New Contracts - Trailing 4 Weeks



— New Contracts - Last Year — New Contracts - This Year ● Jan 1, 2020

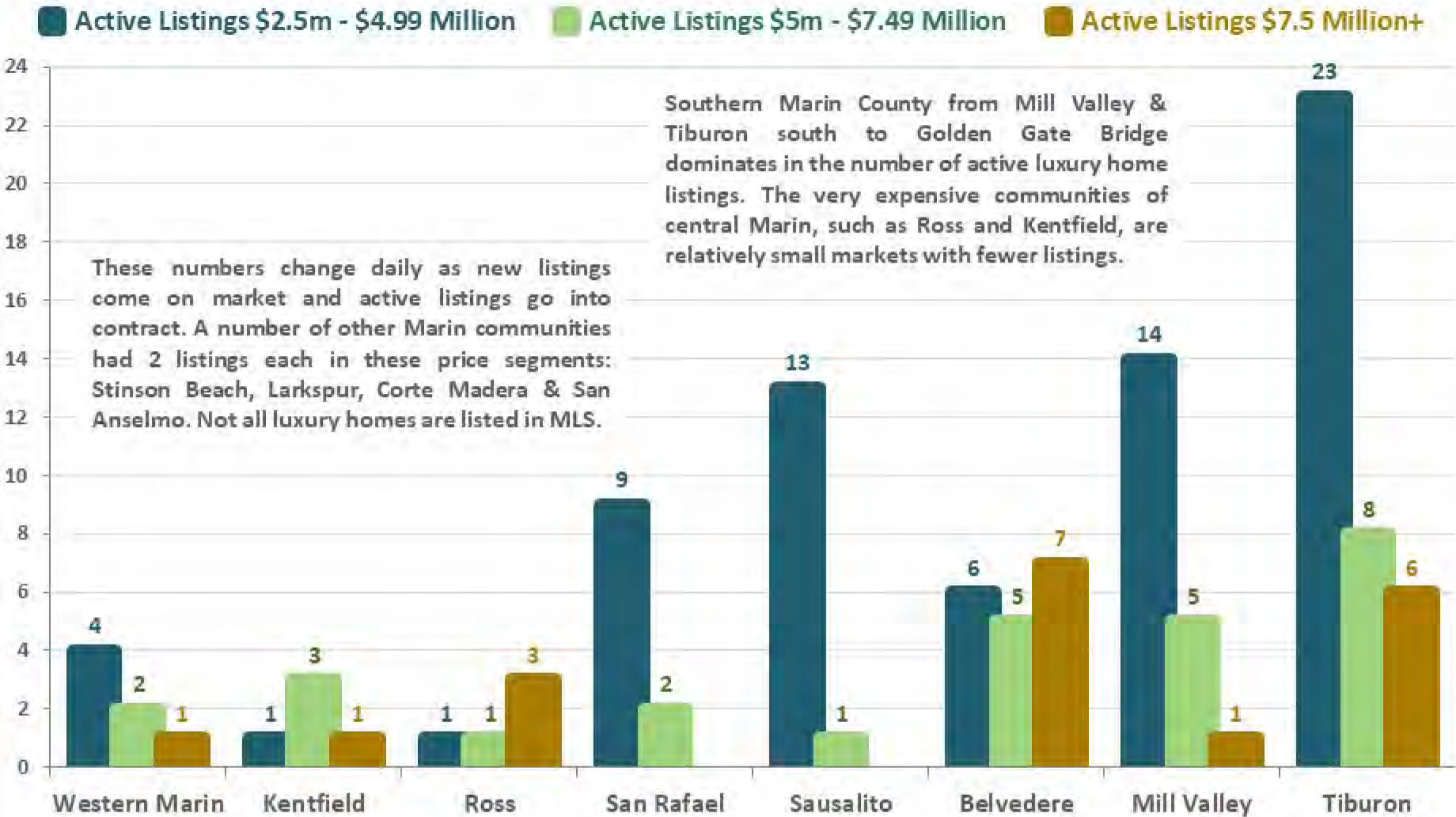
The data herein should be interpreted as approximate and illustrative of general trend lines rather than reflecting exact numbers. Data is sourced from MLS and internal Compass listings data, per all Compass and non-Compass listings from markets for which Compass has an MLS data feed in the greater Bay Area. Data from sources deemed reliable but may contain errors and subject to revision. All numbers are approximate. Generated by Looker.

COMPASS

Where to Find a Luxury Home in Marin to Buy

Active Listings on Market, Priced \$2,500,000+

As listed in MLS in late August 2020



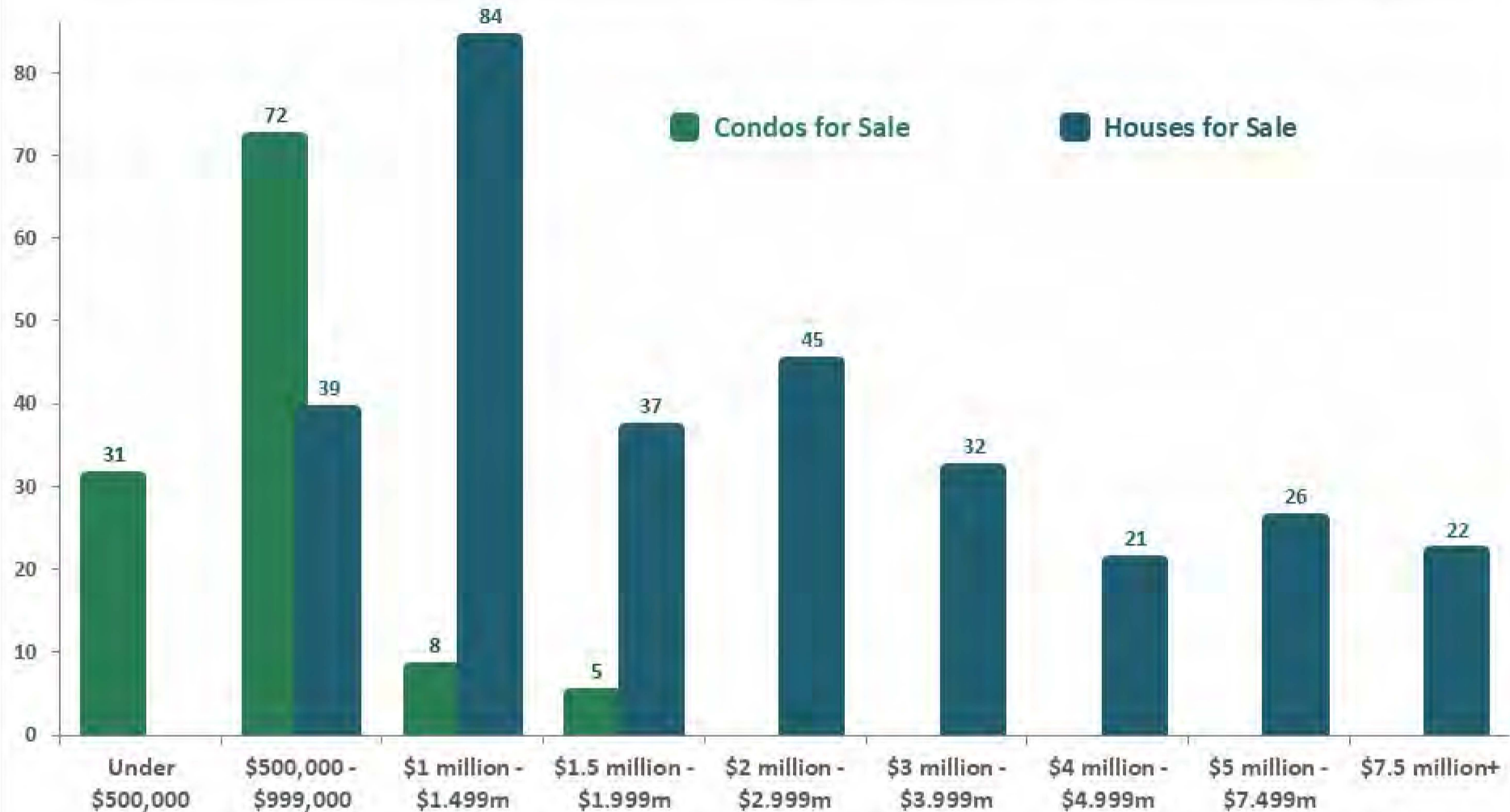
Listings posted to MLS as "Active" or "Coming Soon" in late August 2020. Not all luxury homes for sale are posted to MLS. Data from sources deemed reliable but may contain errors and subject to revision. All numbers approximate.



Marin County Real Estate

ACTIVE LISTINGS on Market by Price Segment, as of 8/26/20

Listings for sale
posted in MLS



Active and Coming Soon listings posted to MLS. Data derived from sources deemed reliable, but may contain errors and subject to revision. All numbers approximate.

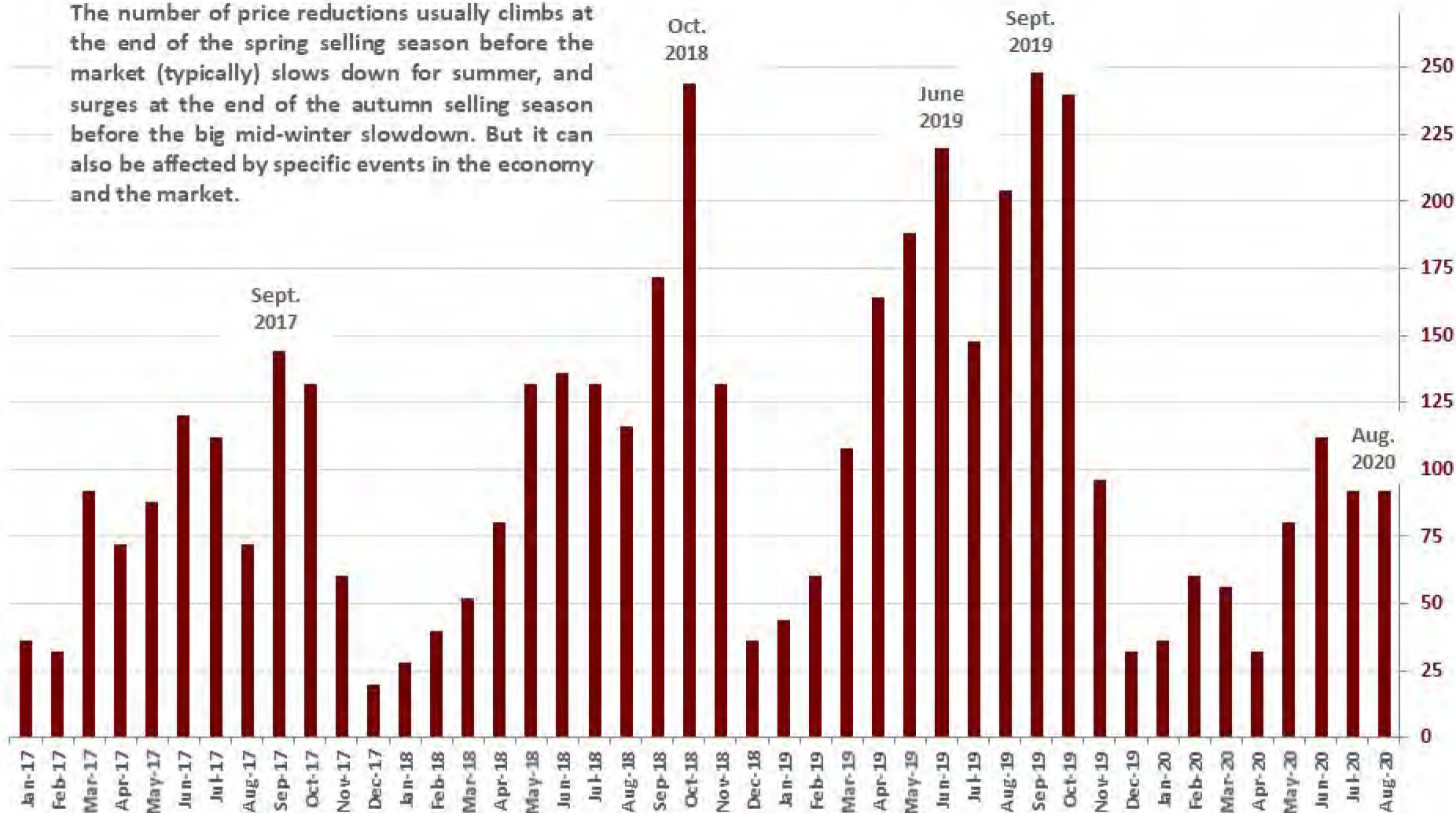
COMPASS

Price Reductions on Active Listings

Marin County Real Estate Market Dynamics

For houses and condos

The number of price reductions usually climbs at the end of the spring selling season before the market (typically) slows down for summer, and surges at the end of the autumn selling season before the big mid-winter slowdown. But it can also be affected by specific events in the economy and the market.



Per Realtor.com Research: <https://www.realtor.com/research/data/>, activity on website. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers to be considered approximate.

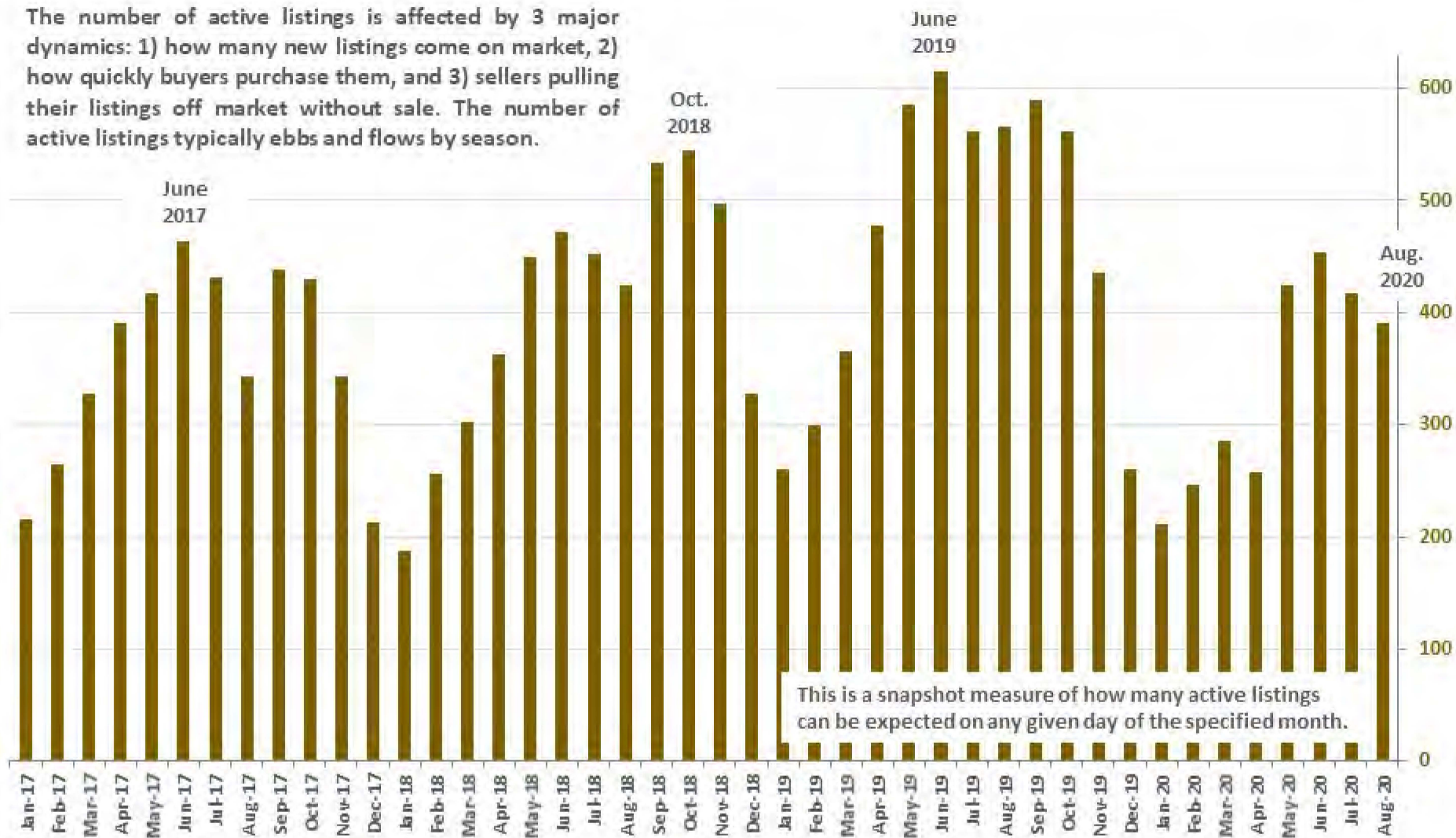
COMPASS

Active Listings on Market

Marin County Real Estate Market Dynamics

For houses and condos

The number of active listings is affected by 3 major dynamics: 1) how many new listings come on market, 2) how quickly buyers purchase them, and 3) sellers pulling their listings off market without sale. The number of active listings typically ebbs and flows by season.



This is a snapshot measure of how many active listings can be expected on any given day of the specified month.

Per Realtor.com Research: <https://www.realtor.com/research/data/>, listings posted on site. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers should be considered approximate.

COMPASS

Bay Area Median House Sales Prices

Summer 2020, June – August Sales

Sales reported over 3-month period to MLS.
Median prices can fluctuate for other
reasons besides changes in fair market value.

County/Region	3 Bedroom, 2 Bath Houses			4 Bedroom, 2-3 Baths Houses		
	Median Sales Price	Median Square Footage	Median Dollar per Square Foot	Median Sales Price	Median Square Footage	Median Dollar per Square Foot
San Francisco	\$1,602,500	1596 sq.ft.	\$993/sq.ft.	\$1,870,000	2115 sq.ft.	\$912/sq.ft.
San Mateo County	\$1,472,500	1490 sq.ft.	\$983 sq.ft.	\$2,000,000	2192 sq.ft.	\$930/sq.ft.
Santa Clara County	\$1,200,000	1420 sq.ft.	\$858/sq.ft.	\$1,400,000	2015 sq.ft.	\$728/sq.ft.
Marin County	\$1,175,000	1624 sq.ft.	\$723/sq.ft.	\$1,492,500	2233 sq.ft.	\$674/sq.ft.
More Expensive Marin Cities	\$1,725,000	1690 sq.ft.	\$958/sq.ft.	\$2,375,000	2435 sq.ft.	\$934/sq.ft.
Santa Cruz County	\$960,000	1580 sq.ft.	\$628/sq.ft.	\$1,200,000	2380 sq.ft.	\$504/sq.ft.
Alameda County	\$925,000	1500 sq.ft.	\$626/sq.ft.	\$1,170,000	2074 sq.ft.	\$552/sq.ft.
Napa County	\$676,000	1475 sq.ft.	\$460/sq.ft.	\$810,000	2106 sq.ft.	\$405/sq.ft.
Sonoma County	\$660,000	1543 sq.ft.	\$437/sq.ft.	\$740,000	2116 sq.ft.	\$370/sq.ft.
Contra Costa	\$642,000	1580 sq.ft.	\$431/sq.ft.	\$843,000	2285 sq.ft.	\$417/sq.ft.
Solano County	\$440,000	1422 sq.ft.	\$315/sq.ft.	\$540,000	2028 sq.ft.	\$266/sq.ft.

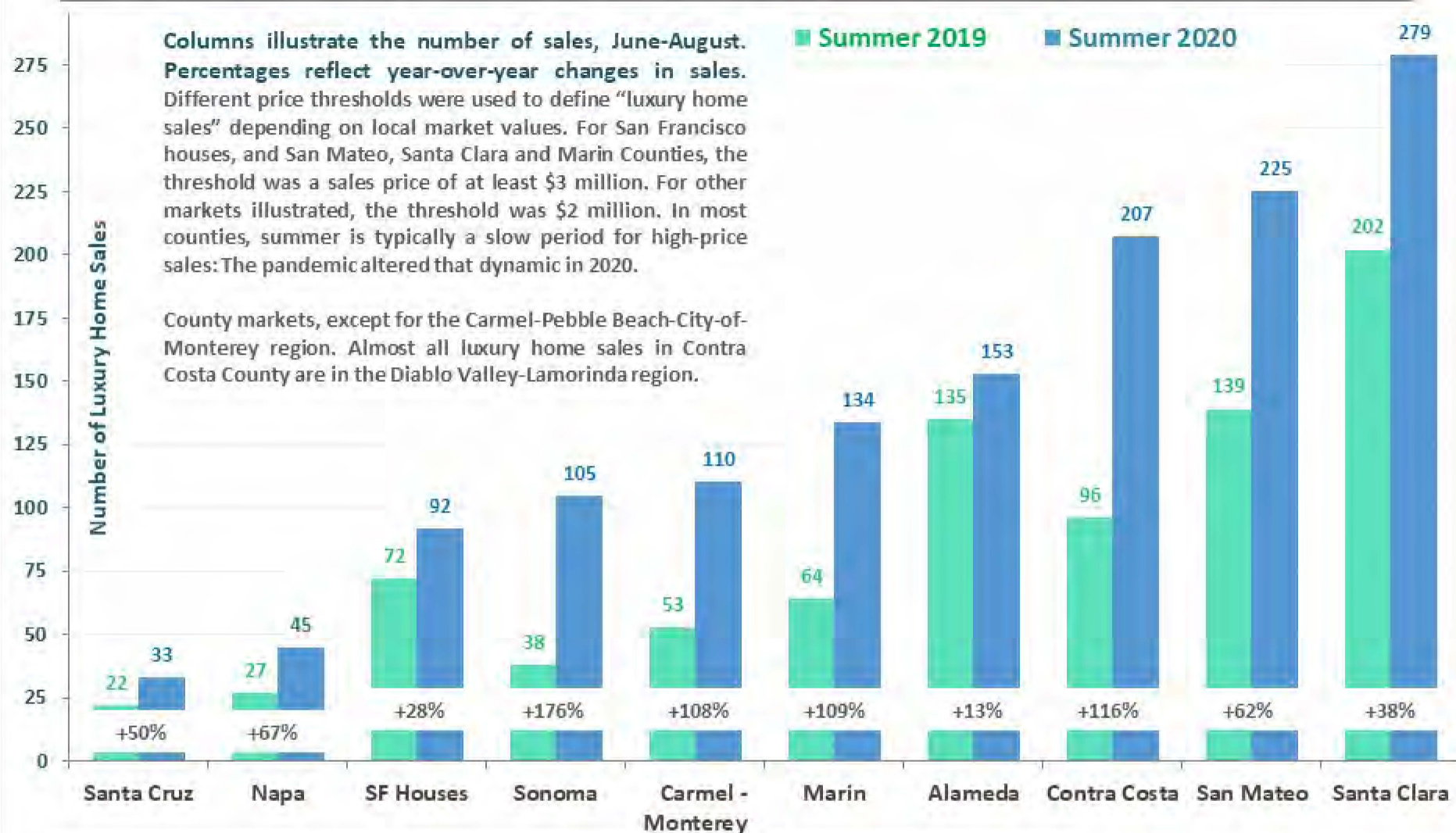
Sales reported to MLS by 9/1/20, houses reporting square footage. Counties have markets of widely varying values.
Data from sources deemed reliable, but may contain errors and subject to revision. All numbers are approximate.

COMPASS

Year-over-Year Change in Bay Area Luxury Home Sales

by Bay Area County, Summer 2019 to Summer 2020

Sales numbers and percentage changes are approximate



Per sales reported to MLS June through August. Not all luxury home sales are reported to MLS. Numbers for summer 2020 are estimated from available data and may change slightly with late reported sales. Data from source deemed reliable, but may contain errors and subject to revision. All numbers are approximate.

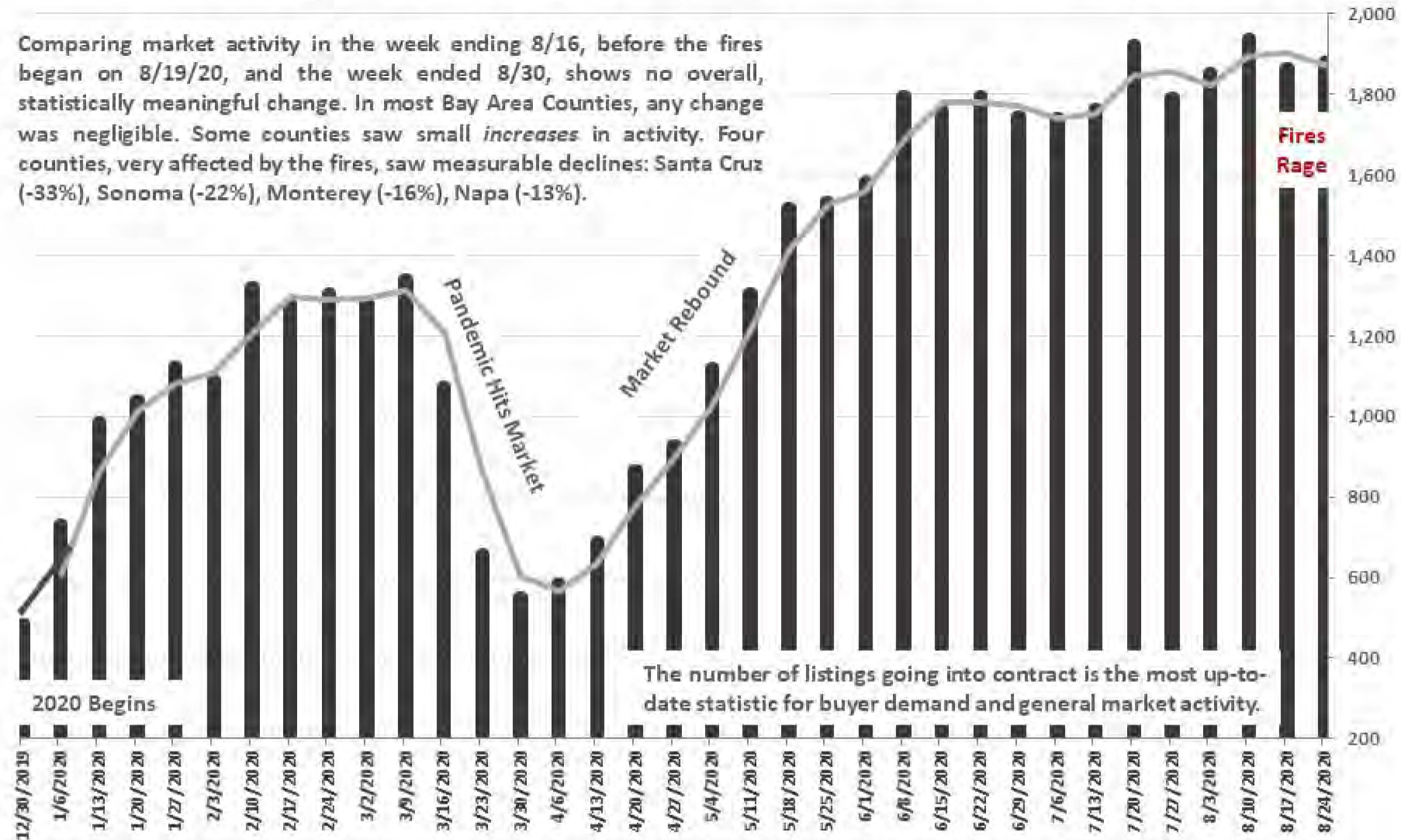
COMPASS

San Francisco Bay Area: Listings Accepting Offers*

Number of Listings Going into Contract, by Week in 2020

Updated through the week
ending August 30, 2020*

Comparing market activity in the week ending 8/16, before the fires began on 8/19/20, and the week ended 8/30, shows no overall, statistically meaningful change. In most Bay Area Counties, any change was negligible. Some counties saw small *increases* in activity. Four counties, very affected by the fires, saw measurable declines: Santa Cruz (-33%), Sonoma (-22%), Monterey (-16%), Napa (-13%).



* MLS reported data, 11 Bay Area Counties, per Broker Metrics. Last week's data may change with late reported activity. Data from sources deemed reliable but may contain errors and subject to revision. All numbers approximate.

COMPASS