# 2018 First Quarter Edition

# **Coldwell Banker Legacy**

#### Sales Increased Relative to First Quarter 2017

Sales were up nearly fourteen percent over the year-ago quarter and dropped from the prior quarter, which is typical for the season. Listing levels have stabilized, dropping less than two percent from the prior quarter and less than three percent from Q1' 2017. With sales and listings examined together, months-of-supply remains within the normal range below six months.

Using both median and average, prices increased by nearly five percent from the prior quarter and median prices increased 6.5 percent from Q1' 2017. The sale price-list price ratio remains stable, indicating that sellers are not chasing a swiftly changing market.

San Angelo Key Stats	Q1 ' 2018	Q-Q Change	Q4 ' 2017	Y-O-Y Change	Q1 ' 2017
Average Sales Price	\$177,650	4.1%	\$170,694	-1.5%	\$180,395
Average \$/Sq.ft.	\$98	4.8%	\$94	3.5%	\$95
Median Sales Price	\$163,000	4.9%	\$155,450	6.5%	\$153,000
DOM	122	7.9%	113	-8.5%	134
Sale % of List	96.8%	-1.1%	97.9%	1.2%	95.7%
Number of Sales	327	-12.6%	374	14.3%	286
Listed Inventory	594	-1.5%	603	-2.6%	610

Source: San Angelo Association of Realtor



#### MEDIAN SALE PRICE AND TRANSACTION COUNTS

YEAR-OVER-YEAR CHANGE IN MEDIAN SALES PRICE AND TRANSACTIONS



#### Prices Changes Were Positive This Quarter



# Indicators

Housing	Q1 ' 2018	Q1 ' 2017
Total Available Housing Inventory (existing)	594	610
Closed (existing)	327	286
Median Price (sold- existing)	\$163,000	\$153,000
New Home Permits	47	38
Rates (%)		
3-Month Libor	2.31	1.15
30-Year Fixed	4.40	4.14
Prime	4.58	3.88
12 Mo-CD Jumbo	0.37	0.27
Employment		
Employment	49,500	48,600
Unemployment <b>V</b> Rate (%)	3.30	4.50

Source: BLS. February Employment Data, Bloomberg, San Angelo Association of Pealtors, ERED, II

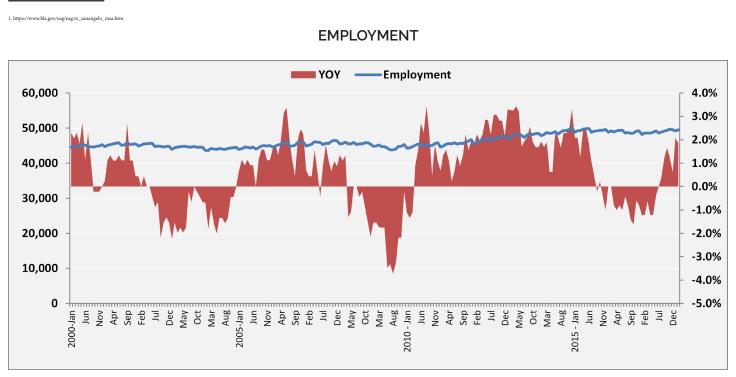


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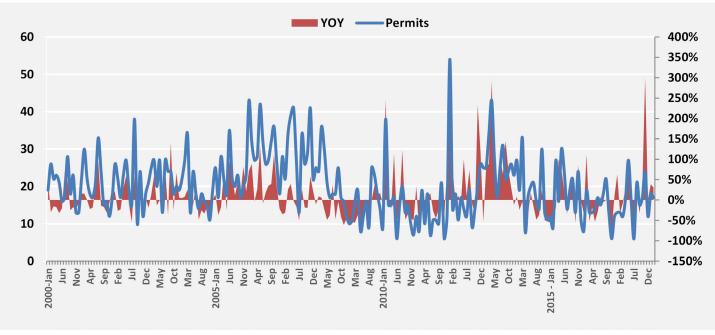
## After some weakness in employment, job growth appears to be returning

Non-farm employment increased by nearly two percent year-over-year. Mining, Logging and Construction remains a growth sector, with some recent meaningful increases. Manufacturing and Financial Activities have also posted recent strong increases. Trade, Transportation and Utilities, Professional and Business Services, Education and Health Services and Government have had minor but positive increases. Information continues to be largely unchanged while Leisure and Hospitality and Other Services are registering declines.<sup>1</sup>

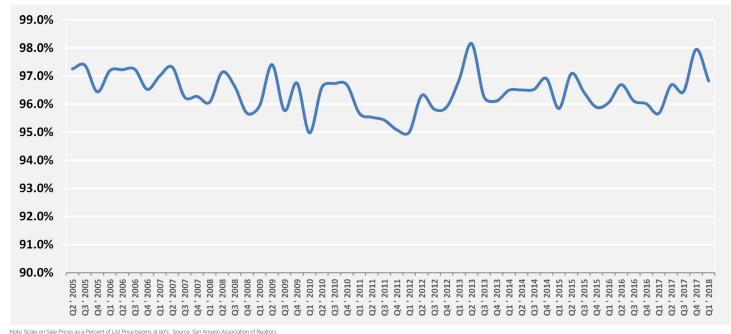


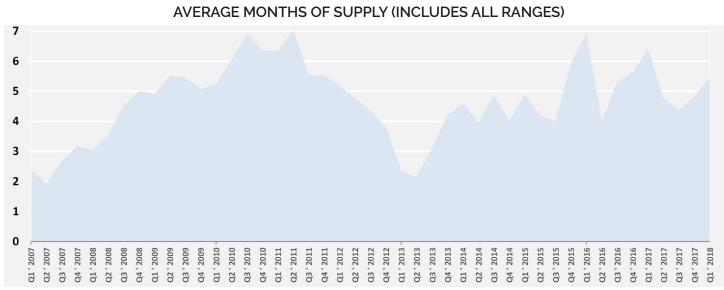
Source: Bureau of Labor Statistics

#### SINGLE FAMILY PERMITS



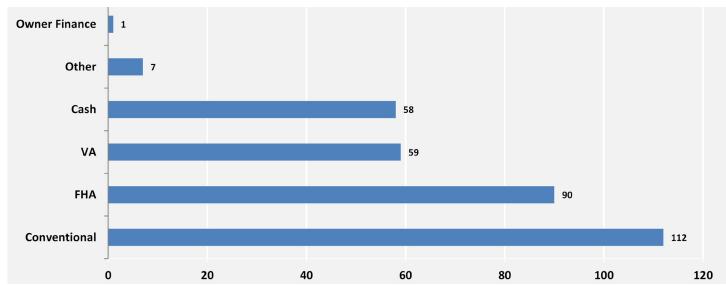
#### SALE PRICE AS A PERCENT OF LIST PRICE



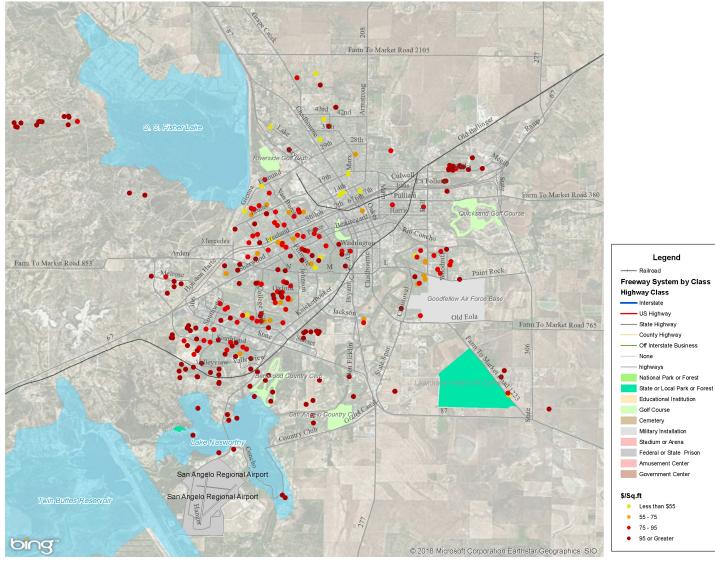


Source: San Angelo Association of Realton

**TYPE OF FINANCING** 



#### HOME SALES PRICE PER-SQUARE FOOT



Source: San Angelo Association of Realtors, ESRI.

#### MONTHS-OF-SUPPLY BY PRICE RANGE

	Q1 ' 2018	Q1 ' 2018	Months
Price Range	Sold	Listed	of Supply
Less than 40,000	10	6	1.8
40,000 - 50,000	6	11	5.5
50,000 - 75,000	16	39	7.3
75,000 - 100,000	37	56	4.5
100,000 - 150,000	74	93	3.8
150,000 - 200,000	77	112	4.4
200,000 - 250,000	60	76	3.8
250,000 - 300,000	18	55	9.2
300,000 - 400,000	19	67	10.6
Greater than 400,000	10	79	23.7
Total/Average	327	594	5.4



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Prepared by Market IQ & Coldwell Banker Legacy.

# **Coldwell Banker Legacy**

## The second quarter broke the trend of flat prices.

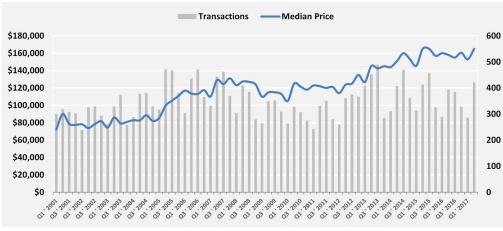
Median home prices moved up almost eight percent from the prior quarter and nearly four percent from the same quarter of last year. The average sale price and average price per-square foot registered increases as well, helping to confirm the break from the recent flat trend.

Sales appear to have risen dramatically from the prior quarter but much of this is the result of seasonality. However, the year-over-year increase of almost seven percent shows there was a meaningful increase in sales. Listings also rose, keeping months-of-supply from declining further. Currently, months-ofsupply is less than five months.

San Angelo Key Stats	Q2 ' 2017	Q-Q Change	Q1 ' 2017	Y-O-Y Change	Q2 ' 2016
Average Sales Price	\$185,239	2.7%	\$180,395	4.0%	\$178,152
Average \$/Sq.ft.	\$97	1.6%	\$95	3.6%	\$93
Median Sales Price	\$165,000	7.8%	\$153,000	4.4%	\$158,000
DOM	123	-8.4%	134	5.5%	116
Sale % of List	96.7%	1.0%	95.7%	0.0%	96.7%
Number of Sales	421	47.2%	286	6.9%	394
Listed Inventory	668	27.2%	525	9.7%	609

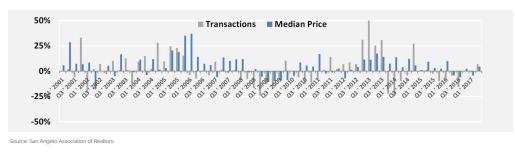
MEDIAN SALE PRICE AND TRANSACTION COUNTS

Source: San Angelo Association of Realtor



Source: San Angelo Association of Realtors.

#### YEAR-OVER-YEAR CHANGE IN MEDIAN SALES PRICE AND TRANSACTION



2017 Second Quarter Edition

# The number of sales increased year-over-year



# Indicators

Housing	Q2 ' 2017	Q2 ' 2016
Total Available Housing Inventory (existing)	668	609
Closed (existing)	421	394
Median Price (sold- existing)	\$165,000	\$158,000
New Home Permits	56	40
Rates (%)		
3-Month Libor	1.30	0.65
30-Year Fixed	3.88	3.48
Prime	4.13	3.50
12 Mo-CD Jumbo	0.27	0.23
Employment		
Employment	49,000	49,400
Unemployment Rate (%)	4.00	4.30

Source: BLS. May Employment Data, Bloomberg, San Angelo Association of Realtons ERED. II

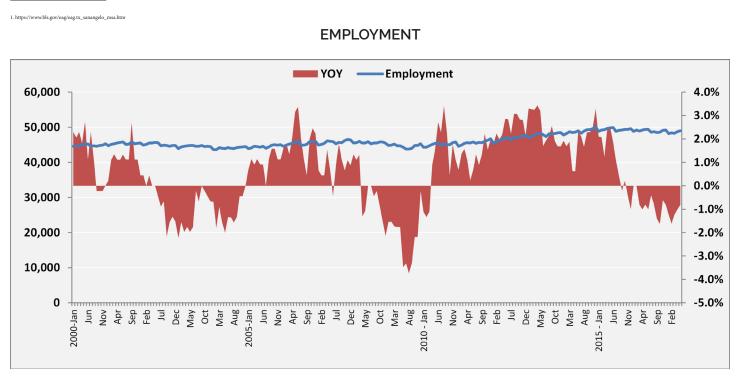


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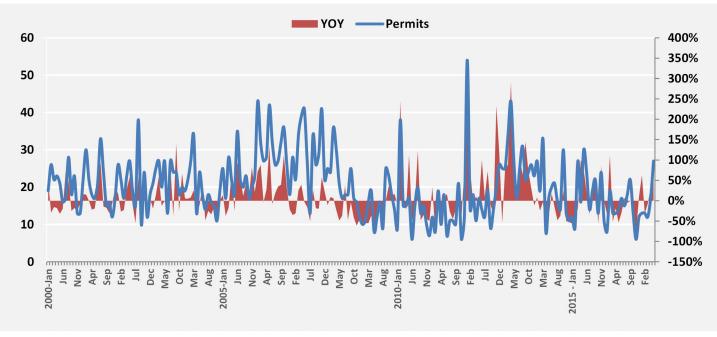
# Non-farm employment has dropped year-over-year but showed some increases in April and May

Most sectors have been flat, however Mining, Logging and Construction lead gains on a year-over-year basis. Manufacturing, Information, Education and Health Services and Leisure and Hospitality and Other Services showed declines.<sup>1</sup>



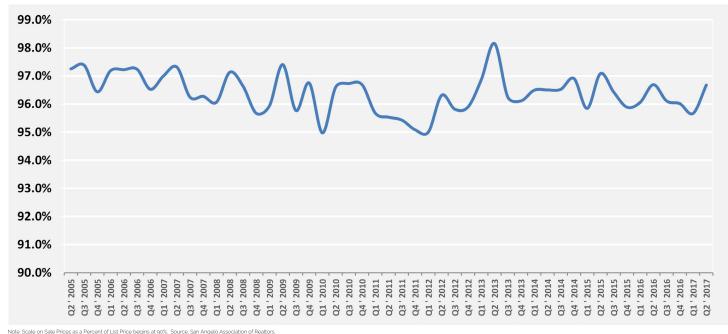
Source: Bureau of Labor Statistics

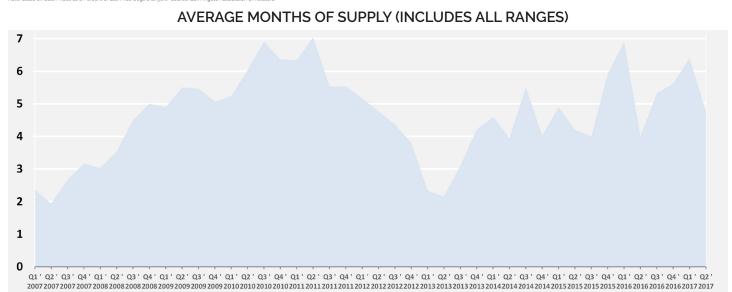
SINGLE FAMILY PERMITS



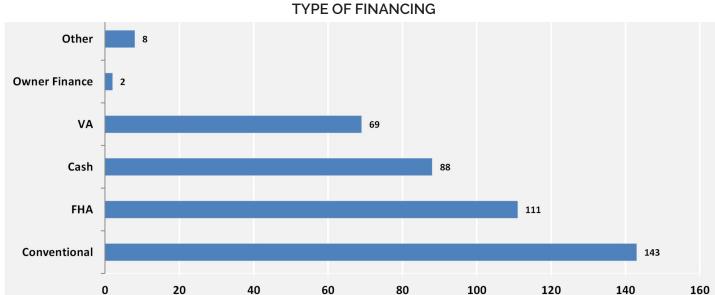
Source: U.S Census, San Angelo Planning & Developmen

#### SALE PRICE AS A PERCENT OF LIST PRICE

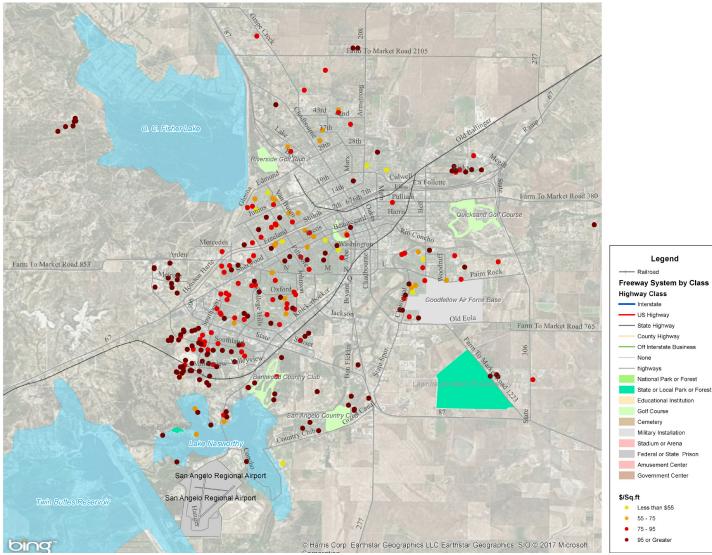








#### HOME SALES PRICE PER-SQUARE FOOT



Source: San Angelo Association of Realtors, ESRI.

#### MONTHS-OF-SUPPLY BY PRICE RANGE

	Q2 ' 2017	Q2 ' 2017	Months
Price Range	Sold	Listed	of Supply
Less than 40,000	16	12	2.3
40,000 - 50,000	9	17	5.7
50,000 - 75,000	28	43	4.6
75,000 - 100,000	36	68	5.7
100,000 - 150,000	92	136	4.4
150,000 - 200,000	99	122	3.7
200,000 - 250,000	68	97	4.3
250,000 - 300,000	28	49	5.3
300,000 - 400,000	25	59	7.1
Greater than 400,000	20	65	9.8
Total/Average	421	668	4.8



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# **Coldwell Banker Legacy**

### The price trend appears to be flat.

Home prices are generally moving in a sideways trend. Year-over-year, sale prices fell by about four percent, in part due to a different mix of the sizes and ages of homes sold.

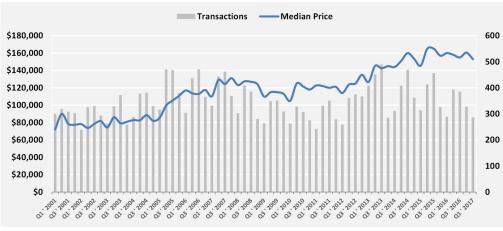
Marketing times continue to move higher, with days on market increasing by almost three percent from last quarter and five percent above the same quarter of last year.

Listing inventory moved higher than last quarter but was in line with the year-ago quarter. Following typical seasonal trends, sales softened in the first quarter but remain similar to last year.

San Angelo Key Stats	Q1 ' 2017	Q-Q Change	Q4 ' 2016	Y-O-Y Change	Q1 ' 2016
Average Sales Price	\$180,395	-0.5%	\$181,323	3.4%	\$174,448
Average \$/Sq.ft.	\$95	-2.2%	\$97	1.4%	\$94
Median Sales Price	\$153,000	-4.7%	\$160,525	-4.4%	\$160,000
DOM	134	3.4%	129	5.3%	127
Sale % of List	95.7%	-0.3%	96.0%	-0.4%	96.1%
Number of Sales	286	-12.8%	328	-1.0%	289
Listed Inventory	610	16.2%	525	0.2%	609

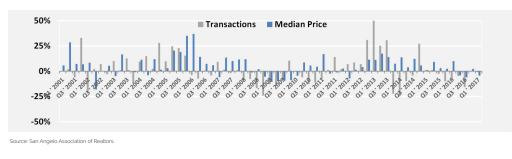
MEDIAN SALE PRICE AND TRANSACTION COUNTS

Source: San Angelo Association of Realtor



Source: San Angelo Association of Realtors.

#### YEAR-OVER-YEAR CHANGE IN MEDIAN SALES PRICE AND TRANSACTION





# The number of sales fell mildly year-over-year



# Indicators

Housing		Q1 ' 2017	Q1 ' 2016
Total Available Housing Inventory (existing)		610	609
Closed (existing)		286	289
Median Price (sold- existing)	▼	\$153,000	\$160,000
New Home Permits		38	40
Rates (%)			
3-Month Libor		1.15	0.63
30-Year Fixed		4.14	3.71
Prime		3.88	3.50
12 Mo-CD Jumbo		0.27	0.23
Employment			
Employment	▼	51,900	53,654
Unemployment Rate (%)		4.60	4.30

Source: BLS. November Employment Data, Bloomberg, San Angelo Association of Realtors, ERED, II

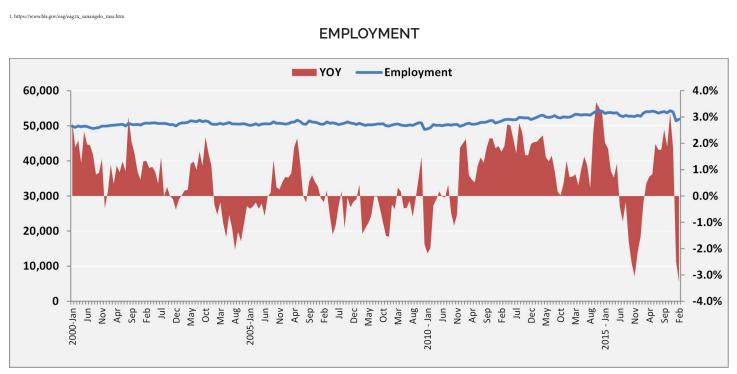


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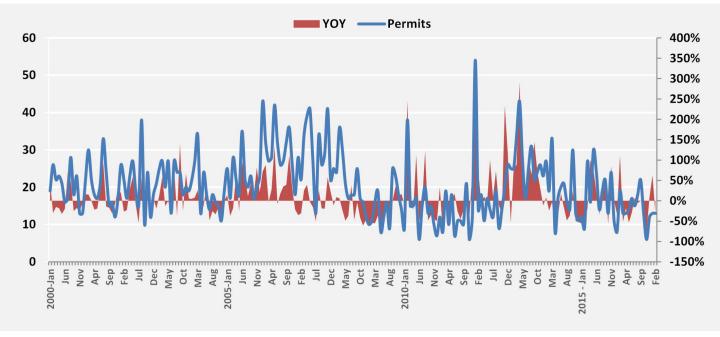
## Employment declined in January and February.

Several employment sectors have had recent declines, including Manufacturing, Information, Education and Health Services, Leisure and Hospitality and Other servers. Mining, Logging and Construction posted moderate gains in January and February and Trade, Transportation and Utilities were mixed. Financial Activities and Professional and Business Services were essentially flat.<sup>1</sup>



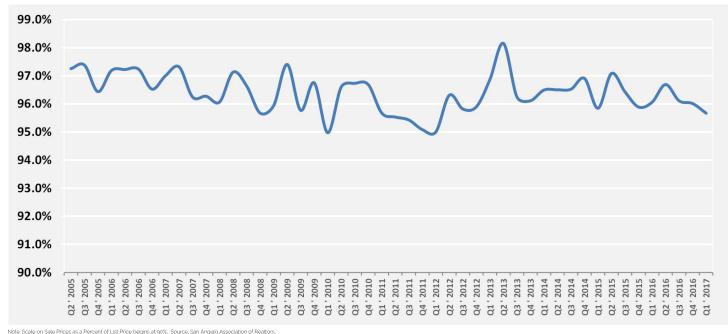
#### Source: Bureau of Labor Statistics

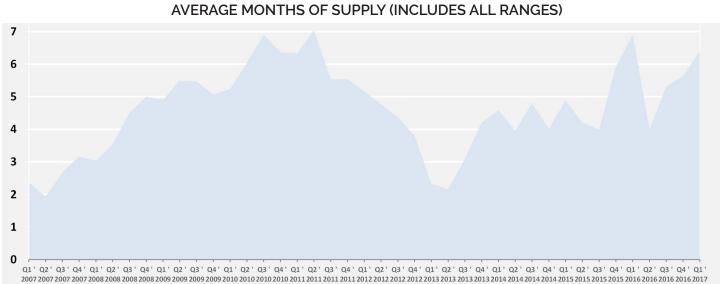
#### SINGLE FAMILY PERMITS



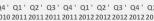
Source: U.S Census, San Angelo Planning & Development

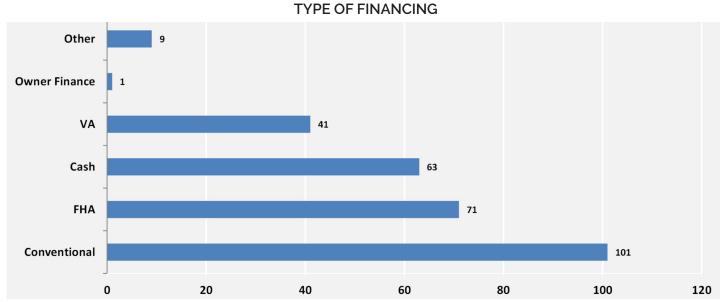
#### SALE PRICE AS A PERCENT OF LIST PRICE



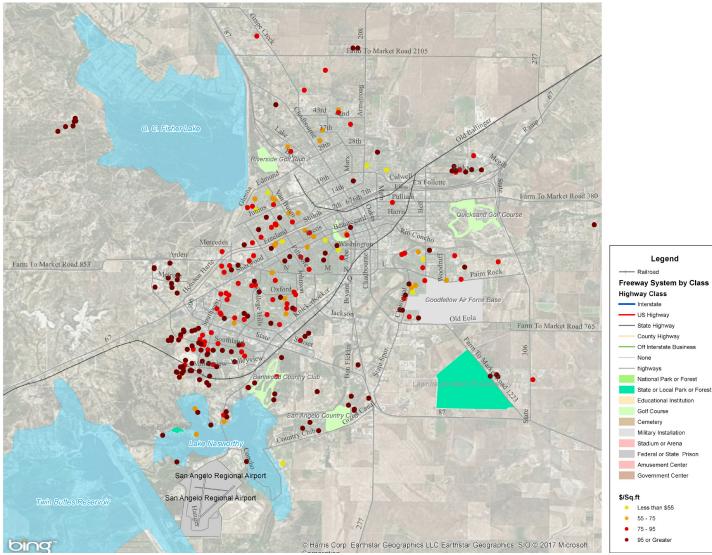


Source: San Angelo Association of Realtors





#### HOME SALES PRICE PER-SQUARE FOOT



Gource: San Angelo Association of Realtors, ESRI.

#### MONTHS-OF-SUPPLY BY PRICE RANGE

	Q1 ' 2017	Q1 ' 2017	Months
Price Range	Sold	Listed	of Supply
Less than 40,000	7	11	4.7
40,000 - 50,000	6	14	7.0
50,000 - 75,000	16	55	10.3
75,000 - 100,000	24	53	6.6
100,000 - 150,000	89	112	3.8
150,000 - 200,000	57	106	5.6
200,000 - 250,000	34	103	9.1
250,000 - 300,000	23	58	7.6
300,000 - 400,000	18	45	7.5
Greater than 400,000	12	53	13.3
Total/Average	286	610	6.4



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# **Coldwell Banker Legacy**

## Median sales prices ended the year higher than the prior year.

Home prices finished 2016 higher than the same quarter of the previous year across all of our measurements. There was also less price volatility in 2016 relative to 2015. In a similar fashion, the salelist price ratio remained very steady.

Listing inventory remained in line with the same quarter of last year and sales were also remarkably similar, keeping months-of-supply, or the time it would take to liquidate the inventory at the recent pace of sales, very similar to the fourth quarter of last year.

While we did see increased home prices, it was at the expense of marketing times, which grew by almost three weeks on average.

San Angelo Key Stats	Q4 ' 2016	Q-Q Change	Q3 ' 2016	Y-O-Y Change	Q4 ' 2015
Average Sales Price	\$181,323	4.2%	\$173,969	1.4%	\$178,752
Average \$/Sq.ft.	\$97	3.7%	\$94	3.2%	\$94
Median Sales Price	\$160,525	3.6%	\$155,000	2.3%	\$156,950
DOM	129	15.5%	112	19.7%	108
Sale % of List	96.0%	-0.1%	96.1%	0.1%	95.9%
Number of Sales	328	-14.8%	385	0.6%	326
Listed Inventory	615	17.1%	525	1.0%	609

Source: San Angelo Association of Realtor



MEDIAN SALE PRICE AND TRANSACTION COUNTS

YEAR-OVER-YEAR CHANGE IN MEDIAN SALES PRICE AND TRANSACTION



2016 Fourth Quarter Edition

#### Marketing Times Have Been Increasing



# Indicators

Housing	Q4 ' 2016	Q4 ' 2015
Total Available Housing Inventory (existing)	615	609
Closed (existing)	328	326
Median Price (sold- existing)	\$160,525	\$156,950
New Home Permits	41	59
Rates (%)		
3-Month Libor	1.00	0.60
30-Year Fixed	4.30	3.96
Prime	3.50	3.25
12 Mo-CD Jumbo	0.24	0.22
Employment		
Employment	54,303	52,652
Unemployment Rate (%)	4.10	4.30

Source: BLS. November Employment Data, Bloomberg, San Angelo



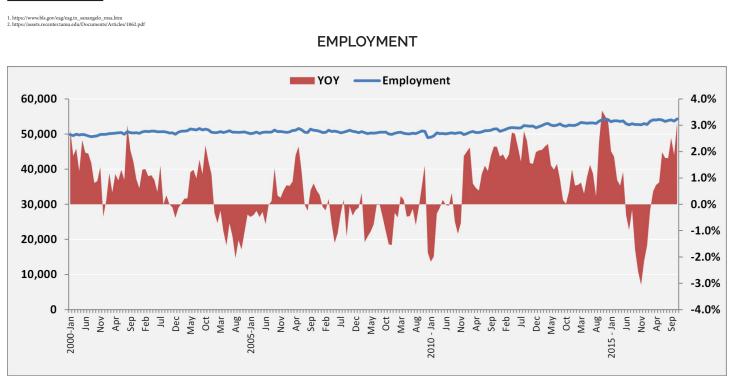
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## Employment Grew Throughout Most of 2016.

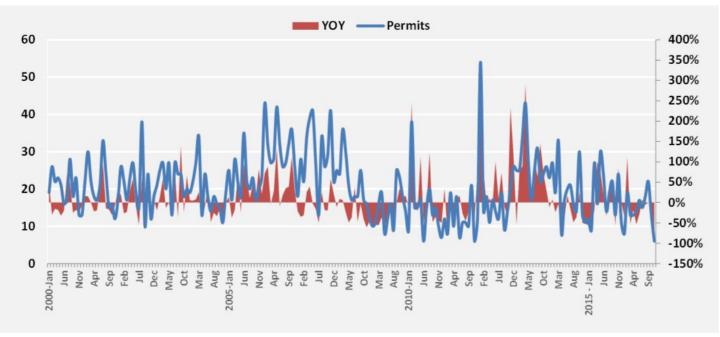
As of November, nonfarm employment was nearly three percent higher than the same month of 2015, adding over 1,500 jobs. The San Angelo employment rate, at around four percent in preliminary figures, is below the national rate of 4.6 percent. Strong sector performers were Trade, Transportation and Utilities, Leisure and Hospitality and Other Services. Mining, Logging and Construction has faired quite well in the past few months. Manufacturing, Government and Financial Activities have largely been flat. Information, a smaller employment segment, was the weakest performer.<sup>1</sup>

Within Texas, San Angelo had the fourth highest employment growth rate, Following Dallas-Plano-Irving, McAllen-Edinburg-Mission and Brownsville-Harlingen.<sup>2</sup>

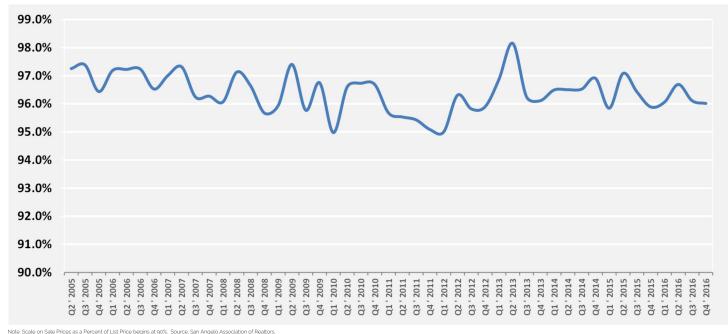


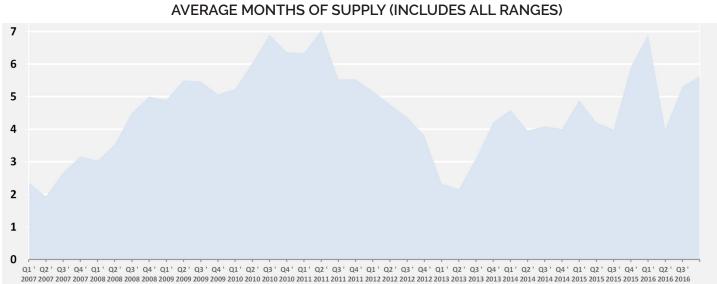
Source: Bureau of Labor Statistics

#### SINGLE FAMILY PERMITS

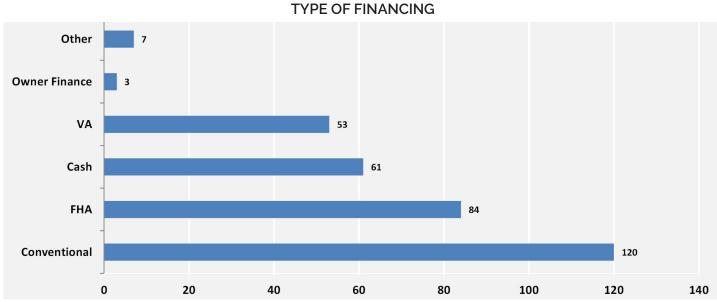


#### SALE PRICE AS A PERCENT OF LIST PRICE

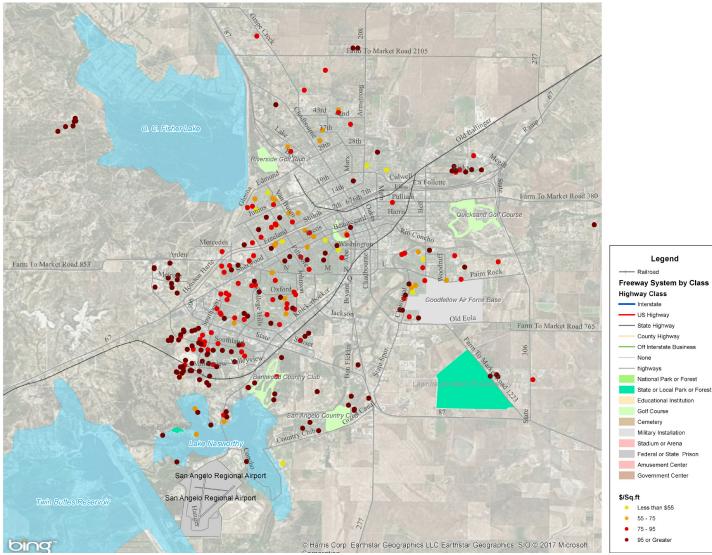








#### HOME SALES PRICE PER-SQUARE FOOT



Gource: San Angelo Association of Realtors, ESRI.

#### MONTHS-OF-SUPPLY BY PRICE RANGE

Price Range	Q4 ' 2016 Sold	Q4 ' 2016 Listed	Months of Supply
Less than 40,000	7	7	3.0
40,000 - 50,000	6	11	5.5
50,000 - 75,000	18	48	8.0
75,000 - 100,000	27	58	6.4
100,000 - 150,000	88	125	4.3
150,000 - 200,000	82	102	3.7
200,000 - 250,000	45	88	5.9
250,000 - 300,000	23	61	8.0
300,000 - 400,000	18	50	8.3
Greater than 400,000	14	65	13.9
Total/Average	328	615	5.6



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# **Coldwell Banker Legacy**

### Median sales prices declined moderately from last quarter.

Year-over-year, prices declined for all measures, coinciding with greater inventories and reduced sales. It should be noted that sales were extremely strong for the third quarters of the recent three years, so we are measuring off of a relatively high base. Sales declined from the second quarter of 2016 by a mild 2.3 percent. The combination of slower sales and higher for-sale inventory caused months-of-supply to increase from about four months-of-supply to about five months, which is relatively close to historical averages.

Marketing times declined slightly from the prior quarter and increased only two percent over the same quarter of 2015. Sale prices as a percent of list prices remain close to the recent observations.

San Angelo Key Stats	Q3 ' 2016	Q-Q Change	Q2 ' 2016	Y-O-Y Change	Q3' 2015
Average Sales Price	\$173,969	-2.3%	\$178,152	-3.1%	\$179,517
Average \$/Sq.ft.	\$94	0.5%	\$93	-0.9%	\$95
Median Sales Price	\$155,000	-1.9%	\$158,000	-6.1%	\$165,000
DOM	112	-3.6%	116	2.0%	110
Sale % of List	96.1%	-0.6%	96.7%	-0.3%	96.4%
Number of Sales	385	-2.3%	394	-15.8%	457
Listed Inventory	682	29.9%	525	12.0%	609

urce: San Angelo Association of Realtor



YEAR-OVER-YEAR CHANGE IN MEDIAN SALES PRICE AND TRANSACTION



2016 Third Quarter Edition





# Indicators

Housing	Q3 ' 2016	Q3 ' 2015
Total Available Housing Inventory (existing)	682	609
Closed (existing)	385	457
Median Price (sold- existing)	\$155,000	\$165,000
New Home Permits	50	57
Rates (%)		
3-Month Elbor	0.85	0.33
30-Year Fixed	3.46	3,89
Prime	3.50	3.25
12 Mo-CD Jumbo	0.23	0.21
Employment	-	
Employment	53,805	52,940
Unemployment A	4.50	4.20

Source: BLS. August Employment Data, Bloomberg, San Angelo Associatio



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## Employment in the San Angelo MSA continues to grind higher.

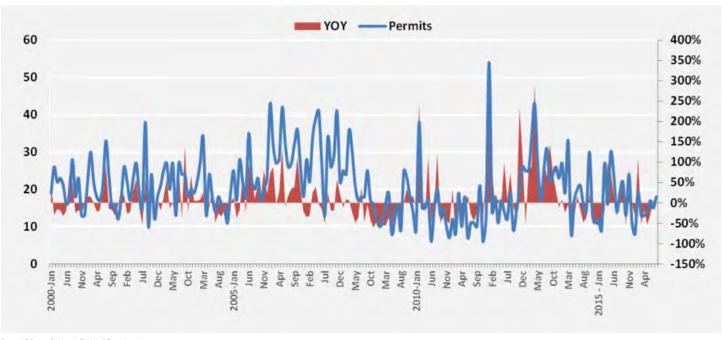
Nonfarm employment has been posting year-over-year gains for the majority of 2016.1 Sector level gains have been occurring in Trade, Transportation and Utilities, Mining, Logging and Construction, Leisure and Hospitality, Professional and Business Services, Education and Health Services and Other Services. Government, Financial Activities and Manufacturing have been relatively flat. Information, one of the smallest sectors, has been shrinking. Although employment is growing, the unemployment rate increased from the same period last year due to greater numbers entering the labor force.

**EMPLOYMENT** YOY Employment 60,000 4.0% 3.0% 50,000 2.0% 40,000 1.0% 30,000 0.0% -1.0% 20,000 -2.0% 10,000 -3.0% 0 -4.0% 2000-Jan May 2005-Jan Oct Mar Aug Nov Feb Dec Oct Aug Iun Aug Vol Feb Sep Inf 2010 - Jan Sep Feb Jul Sep Jul Dec Apr Aay VOV Apr Dec Aay Oct Mar 2015 - Jan Nov Apr

#### rce: Bureau of Labor Statistics

1. http://www.bls.gov/eag/eag.tx\_sanangelo\_msa.htm

#### SINGLE FAMILY PERMITS



Source: U.S Census, San Angelo Planning & Development

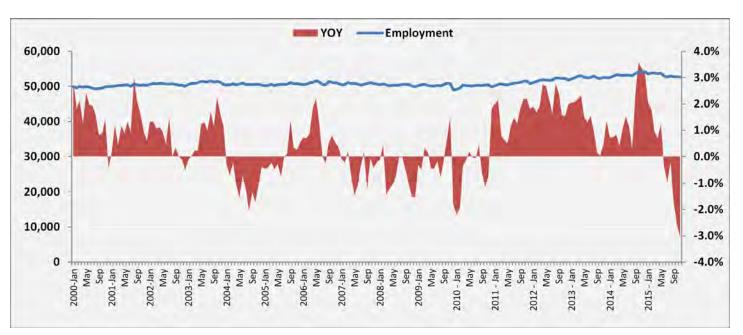
# Employment in the San Angelo area weakened slightly, but several sectors are seeing growth.

Measured from last year (Nov 2014 to Nov 2015), Information, a relatively small sector, remained the weakest sector, dropping by about eleven percent. Leisure and Hospitality and Government also posted declines, Manufacturing, Education and Health Services, Financial Activities and Professional and Business Services were essentially flat. Trade, Transportation and Utilities, Mining, Logging and Construction and Other Services all posted gains.<sup>1</sup>

The energy sector isn't dominant in San Angelo as it is in many other Texas cities and major employers like Angelo State and Goodfellow Air Force base are expanding staff.<sup>2</sup>

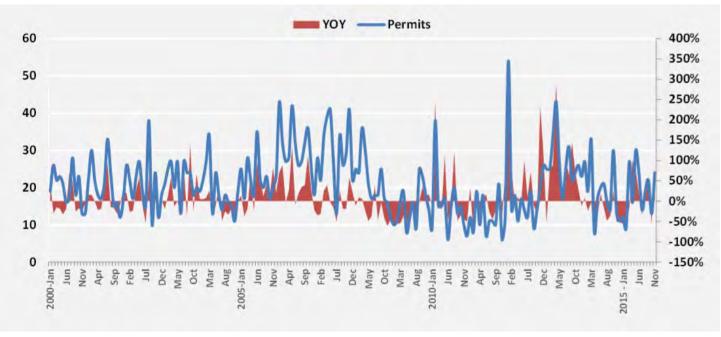
**EMPLOYMENT** 

1. http://www.bls.gov/eag/eag.tx\_sanangelo\_msa.htm 2. http://www.myfoxzone.com/story/30948146/new-businesses-coming-to-san-angelo



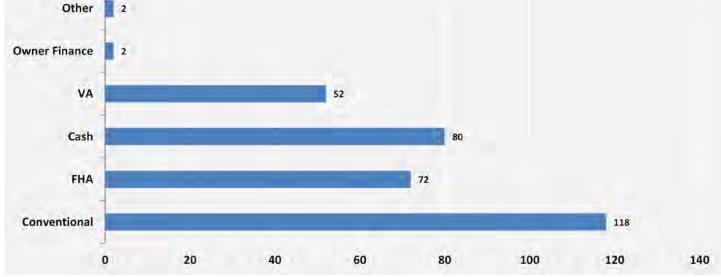
Source: Bureau of Labor Statistics

#### SINGLE FAMILY PERMITS



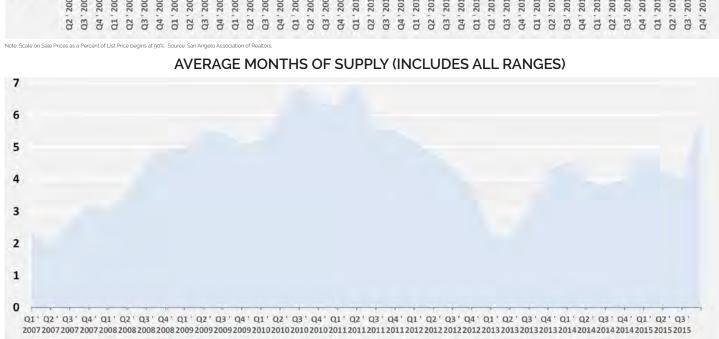
Source: U.S Census, San Angelo Planning & Development.

Source: San Angelo Association of Realtors.



Source: San Angelo Association of Realtors

**TYPE OF FINANCING** 





SALE PRICE AS A PERCENT OF LIST PRICE

# **Coldwell Banker Legacy**

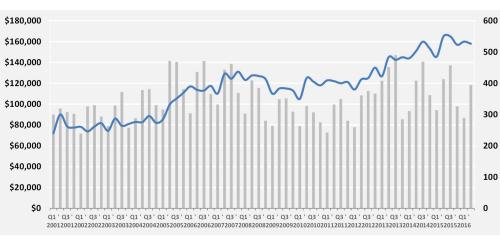
# The level of sales in the second quarter was similar to the same quarter of last year.

The second quarter always tends to show an increase over first quarter sales that seems startling until we look at the year-ago quarter. Up almost 36% from last quarter, sales were off moderately from the second quarter of 2015. Clearly, the second quarter remains one of the seasonally strong quarters.

Sales prices declined from the same quarter of last year, in part reflecting a different mix of homes sold. However, we should also note that Q2 2015 was above trend in terms of price strength. From last quarter, home prices were essentially flat. Similarly, the sale price-list price ratio also remains relatively unchanged.

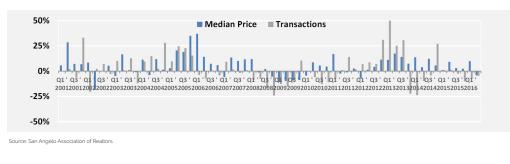
San Angelo Key Stats	Q2 ' 2016	Q-Q Change	Q1 ' 2016	Y-O-Y Change	Q2 ' 2015
Average Sales Price	\$178,152	2.1%	\$174,448	-3.3%	\$184,147
Average \$/Sq.ft.	\$93	-0.4%	\$94	-3.1%	\$96
Median Sales Price	\$158,000	-1.3%	\$160,000	-4.2%	\$165,000
DOM	116	-8.6%	127	4.1%	112
Sale % of List	96.7%	0.6%	96.1%	-0.4%	97.1%
Number of Sales	394	36.3%	289	-4.6%	413
Listed Inventory	525	-21.4%	668	-9.2%	578

Source: San Angelo Association of Realtor



Source: San Angelo Association of Realtors.

#### YEAR-OVER-YEAR CHANGE IN MEDIAN SALES PRICE AND TRANSACTION



2016 Second Quarter Edition

#### Median Home Prices Declined Year-over-Year



## Indicators

Housing		Q2 ' 2016	Q2 ' 2015
Total Available Housing Inventory (existing)	▼	525	578
Closed (existing)		394	413
Median Price (sold- existing)	▼	\$158,000	\$165,000
New Home Permits		40	73
Rates (%)			
3-Month Libor		0.66	0.28
30-Year Fixed		3.57	3.98
Prime		3.50	3.25
12 Mo-CD Jumbo		0.23	0.2
Employment			
Employment		54,240	53,746
Unemployment Rate (%)		4.30	4.10

Source: BLS. May Employment Data, Bloomberg, San Angelo Association of Realtors, ERED, II



# www.cblegacysanangelo.com 325-944-9559

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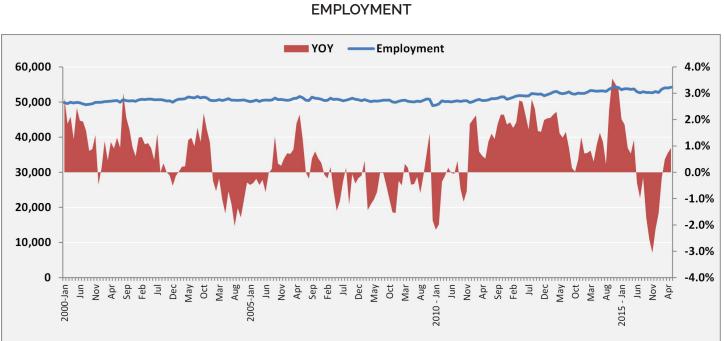
Prepared by Market IQ & Coldwell Banker Legacy.

#### MEDIAN SALE PRICE AND TRANSACTION COUNTS

# Spring Employment Registered an Increase in The San Angelo MSA.

May data revealed an increase in employment of 700 persons.<sup>1</sup> The unemployment rate has not declined substantially because the labor force has increased. Generally, the spread between the number employed and the number in the labor force has been widening since early 2015.

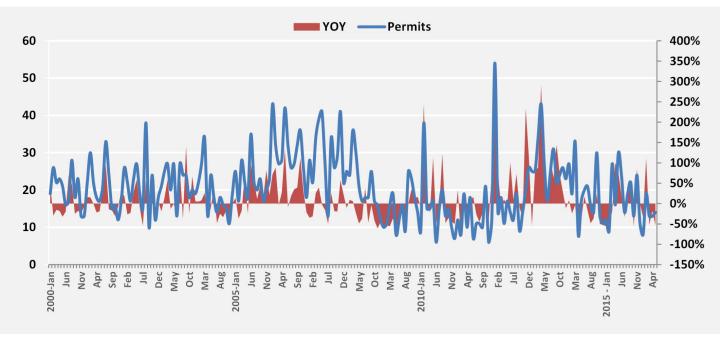
Employment sectors that have been performing well are Trade, Transportation, and Utilities, Professional and Business Services, Leisure and Hospitality, Education and Health Services, Manufacturing and Government. Mining, Logging and Construction, Financial Activities and Information have performed relatively poorly for the past several months. Other Services remain little changed.



rce: Bureau of Labor Statistics

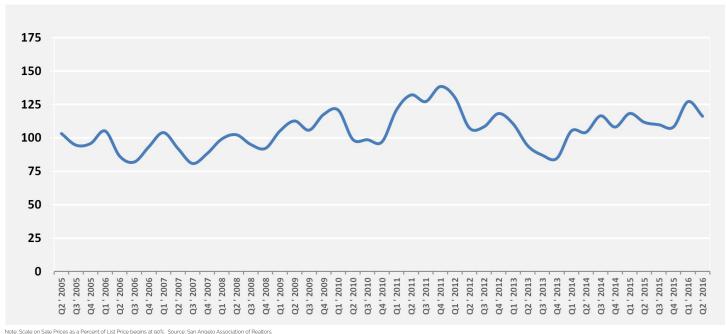
1. http://www.bls.gov/eag/eag.tx\_sanangelo\_msa.htm

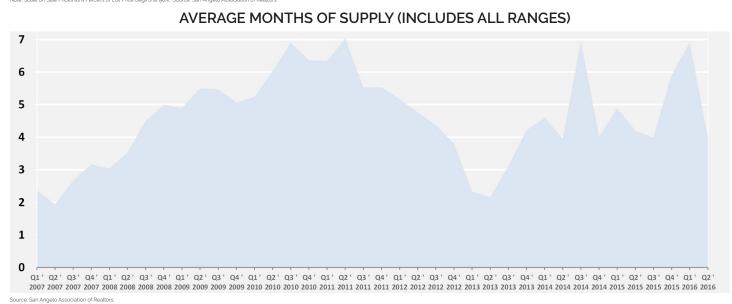
#### SINGLE FAMILY PERMITS

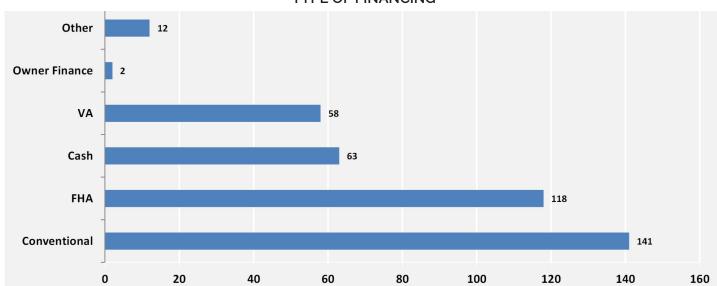


Source: U.S Census, San Angelo Planning & Development



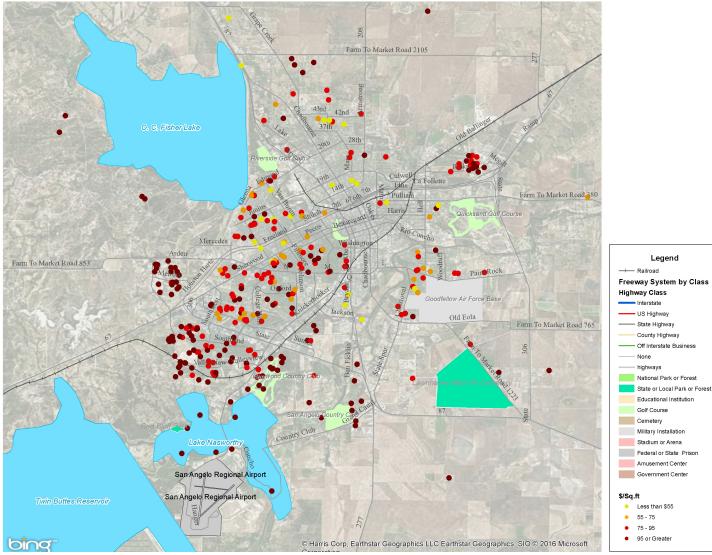






**TYPE OF FINANCING** 

#### HOME SALES PRICE PER SQUARE FOOT



Source: San Angelo Association of Realtors, ESRI.

#### MONTHS-OF-SUPPLY BY PRICE RANGE

	O2 ' 2016	Q2 ' 2016	Months
Price Range	Sold	Listed	of Supply
Less than 40,000	5	7	4.2
40,000 - 50,000	10	10	3.0
50,000 - 75,000	20	41	6.2
75,000 - 100,000	39	58	4.5
100,000 - 150,000	106	98	2.8
150,000 - 200,000	96	105	3.3
200,000 - 250,000	45	68	4.5
250,000 - 300,000	31	45	4.4
300,000 - 400,000	27	31	3.4
Greater than 400,000	15	62	12.4
Total/Average	394	525	4.0



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