



Weekly Market Update

November 21, 2025 *Coaching Wholesalers in a Normalizing Texas Market*

Executive Summary

Team, welcome to this refreshed 15-min briefing as your wholesaling coach at Real Estate IQ. Building on last week's insights (Zillow Oct 31, HAR Oct), we've integrated the latest November data from sources like Texas A&M's Nov 17 Economic Outlook, HAR's Nov update, Unlock MLS Nov, AirDNA Nov, and Freddie Mac Nov 21. Texas remains in normalization mode: Inventory holds balanced (4-6 months), sales ticking up modestly (+0.7-3.2% YoY in metros per Oct data), medians stable to +1.4% (e.g., Austin \$439K-\$630K avg), but price cuts persist (39-53%) amid longer DOM (50-95 days). This sustains wholesaler leverage for 10-20% off-market discounts. LTR softening (-0.1% to -4.3% YoY on supply glut), STR steady (52% occ, +3% ADR). Rates dipped to 6.04-6.44% (30-yr), aiding refis. Watch Alert: Stock Market Drop – Major indexes plunged Nov 20 (S&P -1.5%, Nasdaq -2.1% on Nvidia fade), signaling volatility; could trigger equity taps from rattled sellers if recession fears mount—no crash imminent, but prime for "fear-based" deals. Tactic: Layer stock jitters into scripts for Houston/Austin 90+ DOM targets. Tables refreshed below—Q4 opportunity knocks!

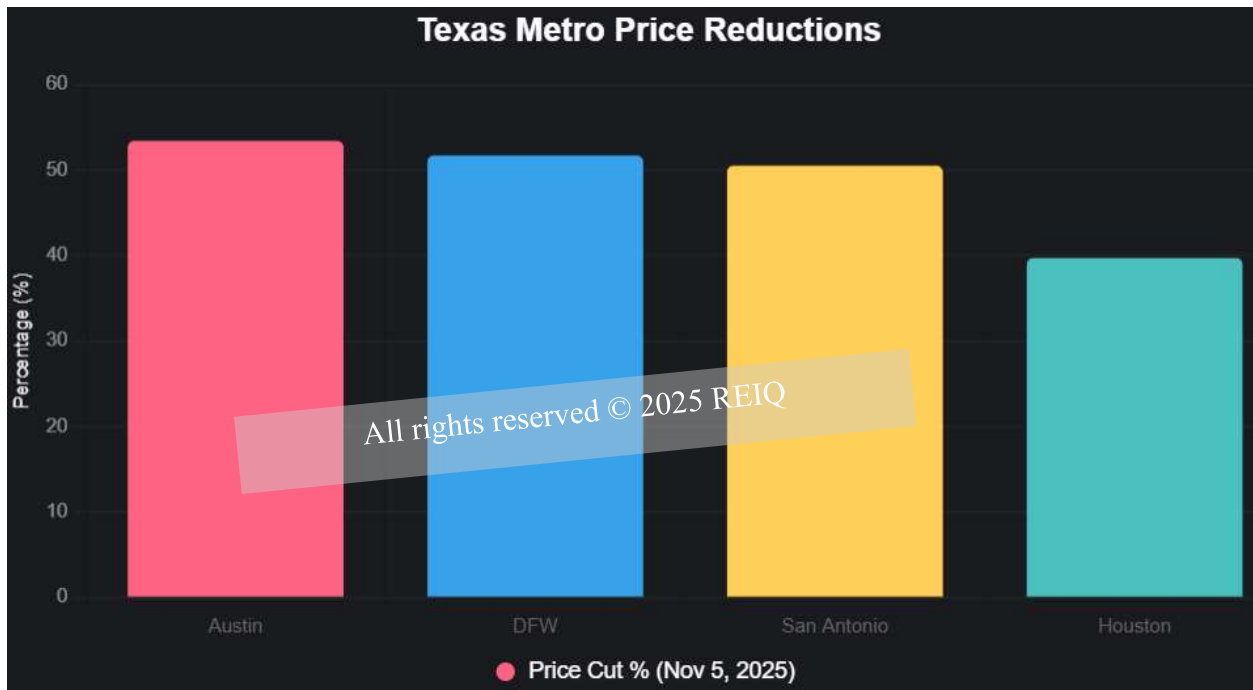
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1. Property Sales Change and Trend (as of November 2025)

Statewide trend: Modest rebound with sales +3% projected for 2025 (TRERC), medians \$333K-\$361K (-0.1% to +1.4% YoY blended), 50-59 days pending (up YoY), 3-6 months inventory—buyer's edge grows, fueling distressed leads.

Metro	Median Sale Price	YoY Change	Months Inventory	Pending Sales YoY	Days on Market	Key Trend/Narrative
DFW	\$364,823 (Dallas Co.) / \$347,000 (Tarrant Co.)	-0.1% / Flat	3.4-5.2	+8.4-11.9% (sales)	84-95	Correcting/balanced; +38.1% inventory YoY Collin Co., Frisco suburbs hot for equity hunts.
Houston	\$330,000	-1.5% to +2%	5.2	13.10%	59	Normalizing/resilient; +3.2% sales YoY Oct, energy stability yields Midtown discounts at 5-7% caps.
Austin	\$439,000-\$630,639 (avg)	1.40%	5.3	5.80%	84-89	Re-calibrating; +0.7% sales to 14,382, -2.4% PPS to \$287—tech floor forms, bulk distress under \$450K.
San Antonio	\$308,995	Flat to -0.4%	5.9	+5% (total sales)	78-84	Balanced/resilient; #1 buyer market (117% more sellers), tourism foreclosures low-barrier flips.

Illustration: Metro Price Cut Percentages (as of November 5, 2025)



2. Long-Term Rental Change and Trend (as of November, 2025)

Statewide: Avg \$1,882 (-0.7% YoY, down \$13), further softening on multifamily glut/vacancy rise—trend: Renter's market concessions; wholesale suburbs for 60%+ ARVs amid out-of-towner demand.

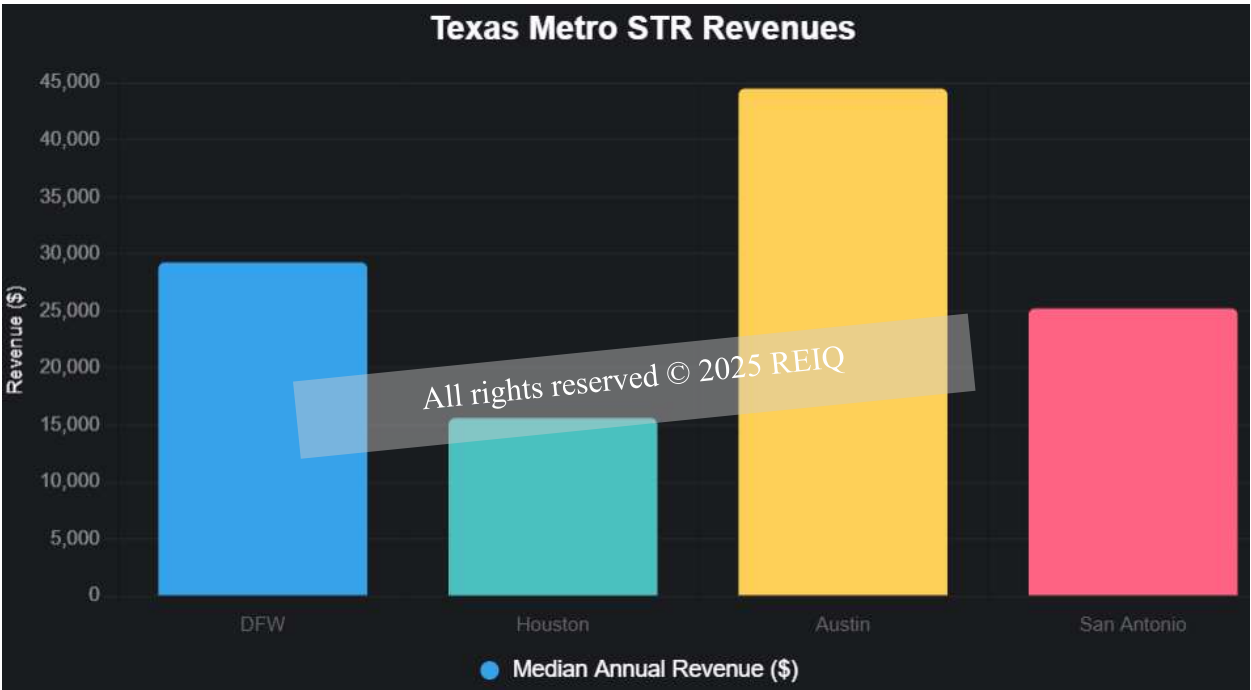
Metro	Avg Rent	YoY Change	Inventory Months/Other	Key Trend/Narrative
DFW	\$1,995	Near 0% (SFH)	-	Apartment boom empowers renters; Irving/Plano job-driven—target conversions in top-5 markets.
Houston	\$1,900	-0.10%	-	Steady healthcare hold; Katy concessions—discount flips amid softening.
Austin	\$1,995	-4.3% (forecast)	4.3 (Travis Co.)	Oversupply cools post-pop boom; lease 93.9% list—under \$2K comps to pros.
San Antonio	\$1,650-\$1,825	+ (Hot, but softening)	Active listings +17%	High turnover exception; military demand—hybrids in resilient pockets.

3. Short-Term Rental Change and Trend (as of November 2025)

Statewide: Maturing with 47-52% occ, ADRs \$171-\$255 (+3% YoY), +5-10% rev; extended stays (37-44%) rise, larger units drive growth—trend: Year-round stability; wholesale event-prox for 70% ROI. Drastic change in Austin (as in the chart)!

Metro	Median Annual Revenue	Occupancy	ADR (YoY)	Key Trend/Narrative
DFW	\$29,256 (\$2,438 monthly)	47-52%	\$150 (+3%)	#1 investment; 37.7% extended—Uptown corporate \$40K+ rev.
Houston	\$15,600-\$18,672	52% (+4%)	\$171.50 (+3%)	44.3% 30+ min; Medical resilient \$40K+.
Austin	\$23,000-\$44,500	52%	\$254.90 (+3%)	Festival regs cap; Zilker 93/100 score \$60K rev.
San Antonio	\$25,217	43.50%	\$140 (+17.2% rev)	Flexible regs (30.8% 1-night); River Walk 70% ROI.

Illustration: STR Revenue Comparison Across Metros (as of November 2025)

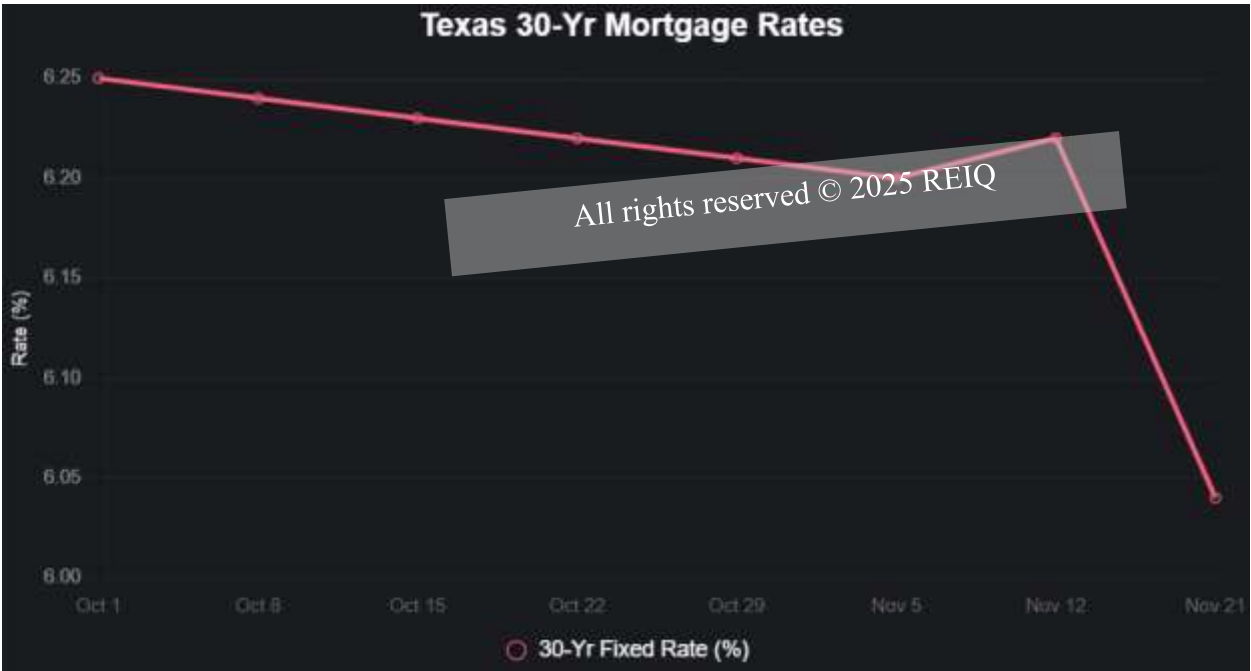


4. Lending & Borrowing Change/Trend (as of November 21, 2025)

Statewide: 30-yr fixed 6.04-6.44% (down WoW to low-6s), 15-yr 5.37-5.70%; borrowing +5-10% on Fed expectations, refis +2.3% YoY—trend: Eases pools amid stock jitters; seller-finance tight-credit flips. Significant change as illustrated in the chart!

Metric	Rate/Value	Trend/Impact
30-Yr Fixed	6.04-6.44%	-0.13-0.2% WoW; boosts JVs 10-12%, ties to +pending surges.
15-Yr Fixed	5.37-5.70%	Stable; refi equity taps in volatile markets.
Borrowing/Refis	+5-10% / +2.3% YoY	Stabilizes sentiment; creative key post-stock drop.

Illustration: Mortgage Rates Trend (as of November 21, 2025)

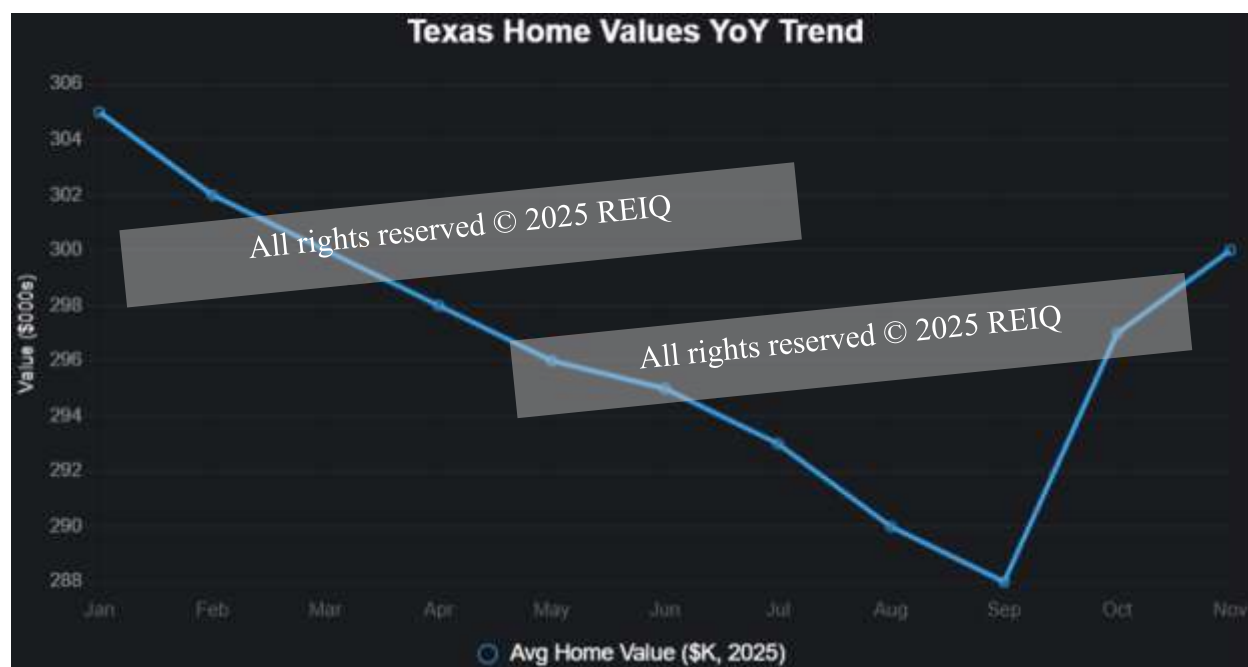


5. Wholesale Deals Change and Trend (as of November 2025)

Texas #1 wholesaling state (+10-15% YoY volume, job/pop growth); normalization + stock volatility fuel leads—trend: 5-10% spreads on 20-30/month; leverage fear for Houston +20% distress.

- **DFW:** +38% inventory steady; 48-hr McKinney assigns.
- **Houston:** High vol 5.5-7% caps; \$10K+ fringe fees.
- **Austin:** Demand amps; tech taps, regs aside.
- **San Antonio:** +15% growth; STR hybrids 15%+ margins.

Illustration: Statewide Home Value Trend (as of October 2025)



Action's Call: Unlock **Free** Coaching with QR Code Below

- Scan MLS or get your OML with promotion →
- Check your OML (Off-Market Lead) portal for latest distressed listing.
- Audit 3 deals via DM for ARV tweaks.
- Network cash buyers in Houston/Austin hotspots and check out our funding availability (First come first serve).
- REIQ Deal Maker & Accelerator Cohort is open (complimentary OML data access).

Next update: November 28, 2025. Let's crush those balanced-market wins!

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