



# Weekly Market Update

December 2, 2025 *Coaching Wholesalers in a Normalizing Texas Market*

## Executive Summary

Dear investors, deal makers, and business builders, your wholesaling coach here with this refreshed 15-min briefing for December 3, 2025. Integrating the freshest data from Texas A&M's Nov 17 Outlook, HAR Nov, Unlock MLS Nov, Redfin Nov, AirDNA Nov, and Freddie Mac Nov 26. Texas normalization deepens: Balanced inventory (4-6 months statewide), sales rebounding +0.7-3.2% YoY (Oct NAR data), medians stable (+1.4% Austin to flat San Antonio), but price cuts linger (39-53%) with 50-95 DOM—wholesaler sweet spot for 10-20% discounts to cash buyers. LTR softening (-0.7% to -4.3% YoY on supply surge), STR resilient (47-52% occ, +3% ADR). Rates eased to 6.23% (30-yr, down WoW), spurring refis. Volatility Watch: Stock Recovery – November closed mixed (S&P +0.13%, YTD +16.45%; Dow +0.32%) after mid-month dip, with Black Friday gains; ongoing AI/earnings swings could rattle sellers—script "market uncertainty" for Houston/Austin equity taps. Tactic: Hit 90+ DOM listings now. Tables/charts updated below—seize Q4 stability!

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

Statewide trend: Rebound with Oct sales 4.1M (+ YoY projected 3% 2025), medians \$333K-\$415K (+2.1% blended), 4.4 months inventory—buyer's leverage persists amid cuts, priming distressed deals.

Metro	Median Sale Price	YoY Change	Months Inventory	Pending Sales YoY	Days on Market	Key Trend/Narrative
DFW	\$364,823 (Dallas) / \$347,000 (Tarrant)	-0.1% / Flat	3.4-5.2	+8.4-11.9% (sales)	84-95	Correcting/balanced; +38.1% inventory Collin Co., Frisco equity hunts amid steady declines.
Houston	\$330,000	-1.5% to +2%	5.2	13.10%	59	Resilient/normalizing; +3.2% Oct sales, energy yields Midtown 5-7% cap discounts.
Austin	\$439,000 (sales) / \$499,000 (list)	+1.4% / -5% list	5.3	5.80%	84-89	#2 buyer's market; +0.7% sales, -2.4% PPS \$287—supply surge fuels bulk under \$450K.
San Antonio	\$308,995	Flat to -0.4%	5.9	+5% (total sales)	78-84	#1 buyer's market; 117% more sellers, tourism foreclosures low-barrier flips.

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

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

Statewide: Avg \$1,882 (-0.7% YoY), deepening soften on multifamily glut/vacancies—trend: Concessions rise; wholesale suburbs for 60%+ ARVs with outmigration demand.

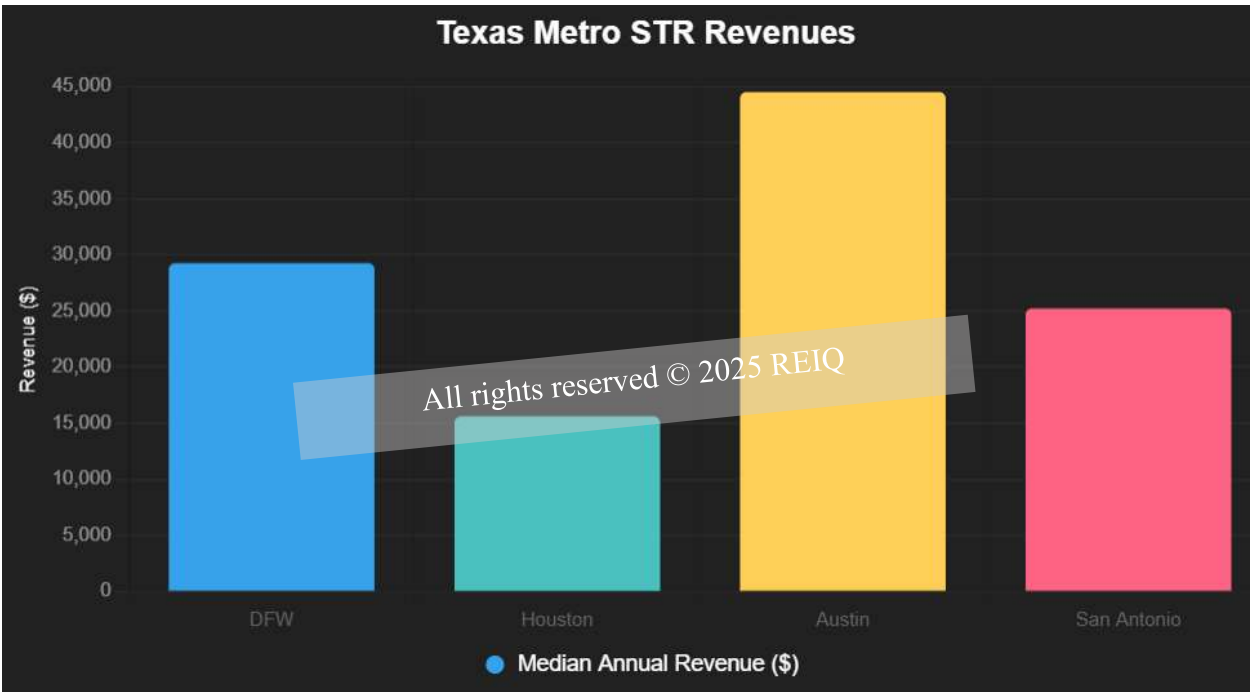
Metro	Avg Rent	YoY Change	Inventory Months/Other	Key Trend/Narrative
DFW	\$1,995	Near 0% (SFH)	-	Modest growth affordable; Irving/Plano jobs—target top-5 conversions.
Houston	\$1,900	-0.10%	-	Steady demand rising rents; high-potential areas like Katy—discount flips.
Austin	\$1,995	-4.3% (suburbs lead declines)	4.3 (Travis)	Supply surge cools boom; 93.9% lease list—under \$2K to pros.
San Antonio	\$1,650-\$1,825	+ (Hot softening)	Active +17%	Steady growth high activity; military hybrids resilient.

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

Statewide: Maturing 47-52% occ, ADRs \$171-\$255 (+3% YoY), +5-10% rev; extended stays (37-44%) + larger units—trend: Stability in top markets; wholesale events for 70% ROI.

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+.
Houston	\$15,600-\$18,672	52% (+4%)	\$171.50 (+3%)	44.3% 30+ min; Medical \$40K+ resilient.
Austin	\$23,000-\$44,500	52%	\$254.90 (+3%)	Top market regs cap; Zilker 93/100 \$60K rev.
San Antonio	\$25,217	43.50%	\$140 (+17.2% rev)	Flexible (30.8% 1-night); River Walk 70% ROI.

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



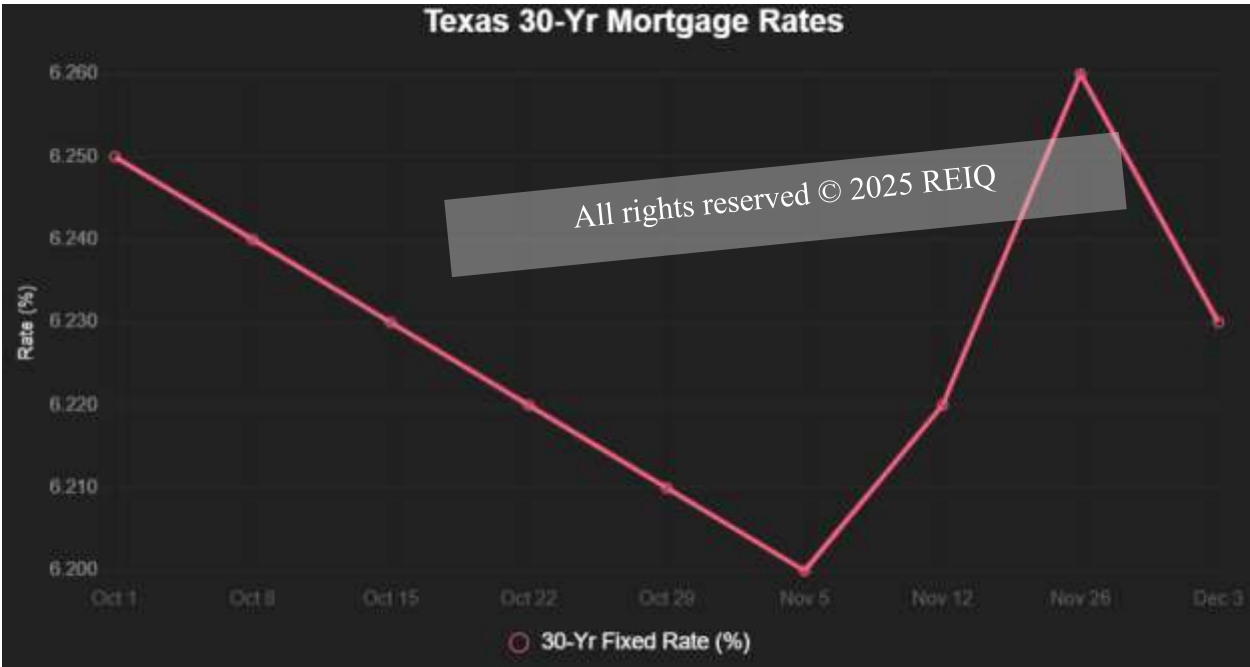
## 4. Lending & Borrowing Change/Trend (as of December 3, 2025)

Statewide: 30-yr fixed 6.23% (down from 6.26% WoW), 15-yr ~5.37-5.79%; borrowing +5-10% on Fed hopes, refis +2.3% YoY—trend: Eases amid volatility; seller-finance flips.

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Metric	Rate/Value	Trend/Impact
30-Yr Fixed	6.23%	-0.03% WoW; boosts JVs 10-12%, pending ties.
15-Yr Fixed	5.37-5.79%	Stable; refi taps volatile equity.
Borrowing/Refis	+5-10% / +2.3% YoY	Sentiment stabilizer; creative post-stocks.

### Illustration: Mortgage Rates Trend (as of December 3, 2025)

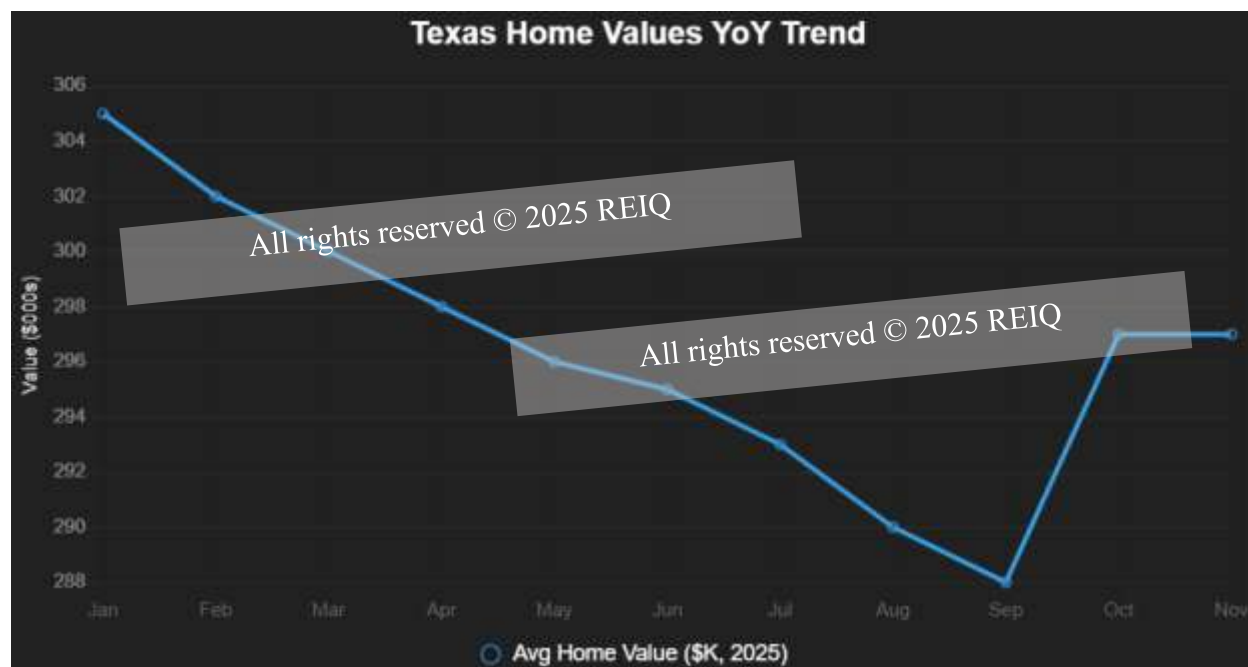


## 5. Wholesale Deals Change and Trend (as of November 2025)

Texas #1 wholesaling (+10-15% YoY on pop/jobs); stabilizing + volatility fuel leads—trend: 5-10% spreads 20-30/month; fear-leverage Houston +20% distress.

- **DFW:** +38% inventory; 48-hr McKinney assigns.
- **Houston:** High vol 5.5-7% caps; \$10K+ fringe.
- **Austin:** #2 buyer's amps demand; tech taps.
- **San Antonio:** +15% #1 buyer growth; STR hybrids 15%+.

## Illustration: Statewide Home Value Trend (as of November 2025)



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

- Scan Nov 90+ DOM MLS, pitch stock uncertainty.
- Audit 3 deals via DM for ARV stability.
- Lists: Houston energy, Austin supply for closes.
- REIQ Deal Maker & Accelerator Cohort is open (complimentary OML data access).

Next update: December 10, 2025.  
Let's crush those balanced-market wins!

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