



Weekly Market Update

December 11, 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 11, 2025. Integrating the latest data from Texas A&M's Nov 17 Outlook, HAR Nov, Unlock MLS/Redfin Nov, AirDNA Nov, Freddie Mac Nov 26/Dec 4, and post-Fed cut updates. Texas market stabilizes: Balanced inventory (4-6 months), sales mixed with declines (-2.1% Houston to -11.2% Austin YoY Oct), medians softening (-0.1% to -5% list in Austin), price cuts ongoing (39-53%) with 50-95 DOM—wholesaler leverage for 10-20% discounts holds. LTR softening (-0.7% to -4.3% YoY amid glut), STR resilient (47-52% occ, +3% ADR, demand +5.7%). Fed Cut Impact: Yesterday's 25 bps cut to 3.5-3.75% (9-3 vote, hawkish signal for pause/1 cut 2026) keeps mortgage rates flat/slightly up at 6.19-6.34% (Dec 4-10), but boosts refi/buyer sentiment. Volatility Watch: Stocks Surge: Dow +0.9% to record Dec 10, S&P/Nasdaq mixed; Nov strong (S&P +2.3%, YTD +17.5%)—script "rate relief amid gains" for equity taps. Tactic: Target 90+ DOM in Austin/San Antonio buyer's markets. Tables/charts updated—capitalize on Q4/2026 setup!

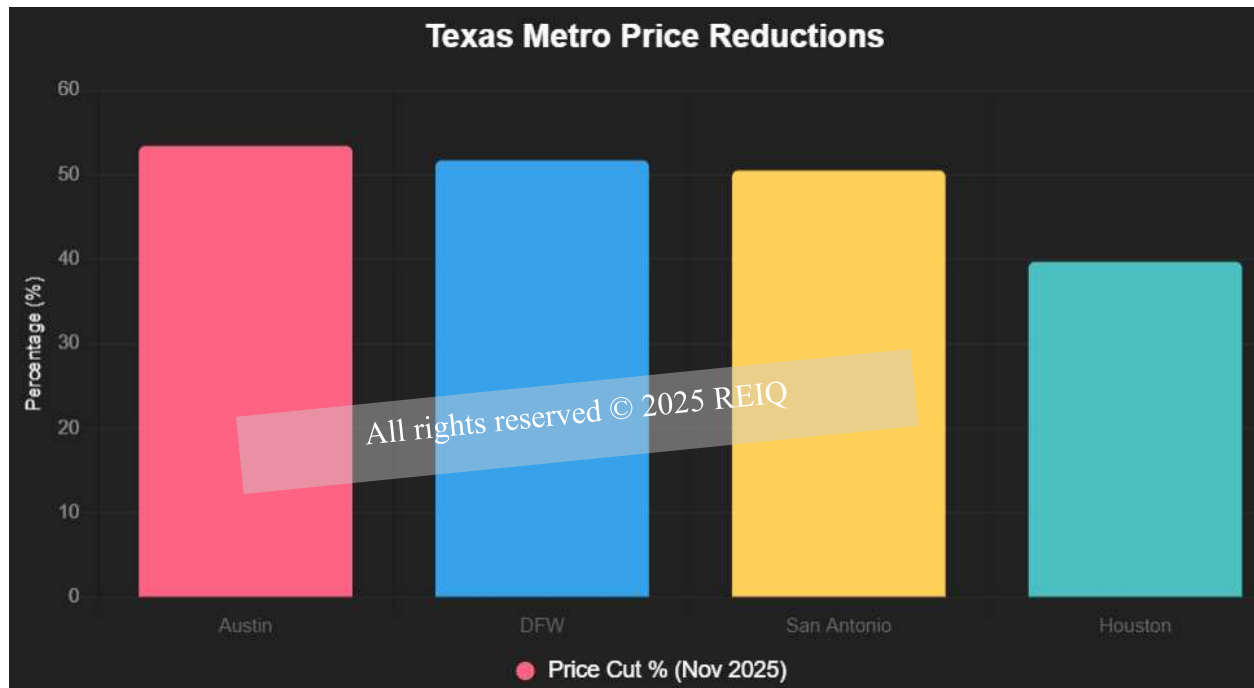
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1. Property Sales Change and Trend (as of November 2025)

Statewide trend: Rebound projected +3% sales 2025, medians \$333K-\$415K (+2.1% blended), inventory up 9.3% to 180K homes (Oct), 4.4 months—buyer's shift deepens, high turnover in metros fuels distressed leads.

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., steady declines, Frisco hunts post-cut sentiment.
Houston	\$330,000	-1.5% to +2%	5.2	13.10%	59	Resilient; +3.2% Oct sales, -2.1% existing declines—energy/Midtown caps 5-7%.
Austin	\$439,000 (sales) / \$499,000 (list)	+1.4% / -5% list	5.3	5.80%	84-89	#2 buyer's; -11.2% existing sales, +0.7% total, -2.4% PPS \$287—supply bulk under \$450K.
San Antonio	\$308,995	Flat to -0.4%	5.9	+5% (total sales)	78-84	#1 buyer's; steepest TX decline existing sales, 117% more sellers—tourism foreclosures flips

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



2. Long-Term Rental Change and Trend (as of December, 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.

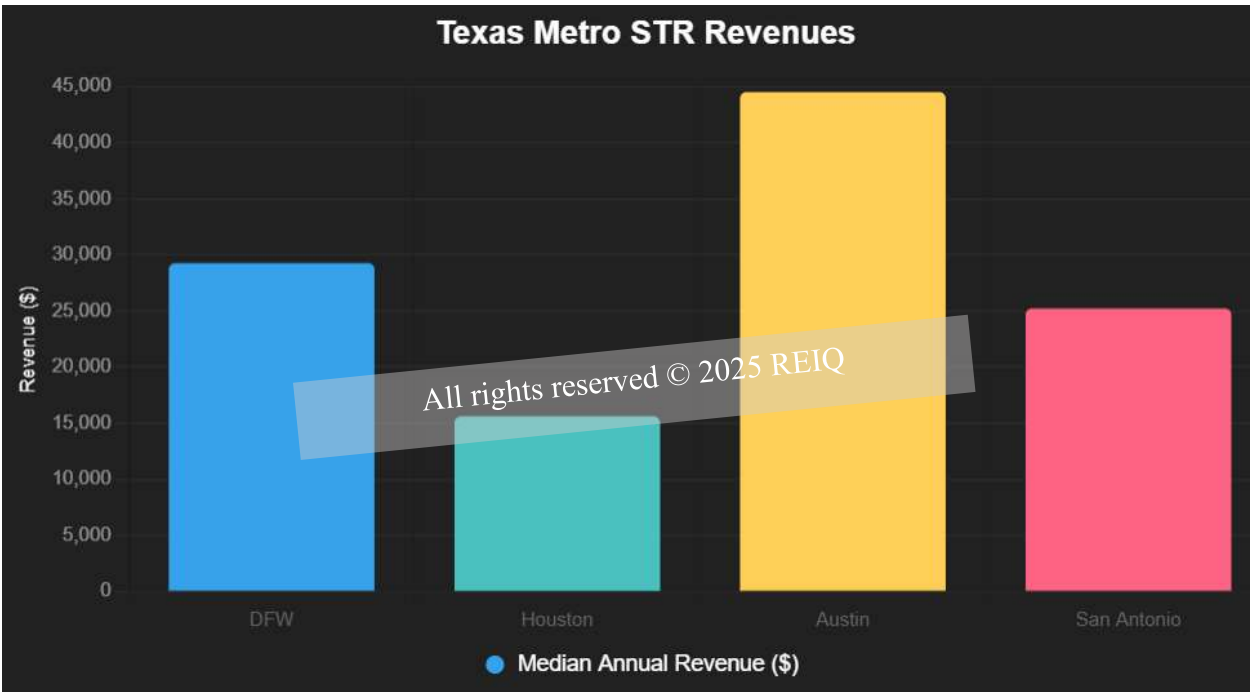
Metro	Avg Rent	YoY Change	Inventory Months/Other	Key Trend/Narrative
DFW	\$1,995	Near 0% (SFH) / +1.5% Q4	-	Modest/affordable growth; Irving/Plano jobs—top-5 conversions, RCI scores climb.
Houston	\$1,900	-0.10%	-	Steady/rising demand; high-potential Katy—discount flips.
Austin	\$1,995	-4.3% Q1 / -1.4% year-end	4.3 (Travis)	Most expensive metro; supply cools boom, 93.9% lease—under \$2K pros, +2% 1-bed.
San Antonio	\$1,650-\$1,825	+ (Hot softening)	Active +17%	Steady growth/activity; military hybrids, buyer-leaning hold.

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

Statewide: Maturing 47-52% occ, ADRs \$171-\$255 (+3% YoY), +5-10% rev; extended stays (37-44%) + larger units—trend: Resilience, demand +5.7%; 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)



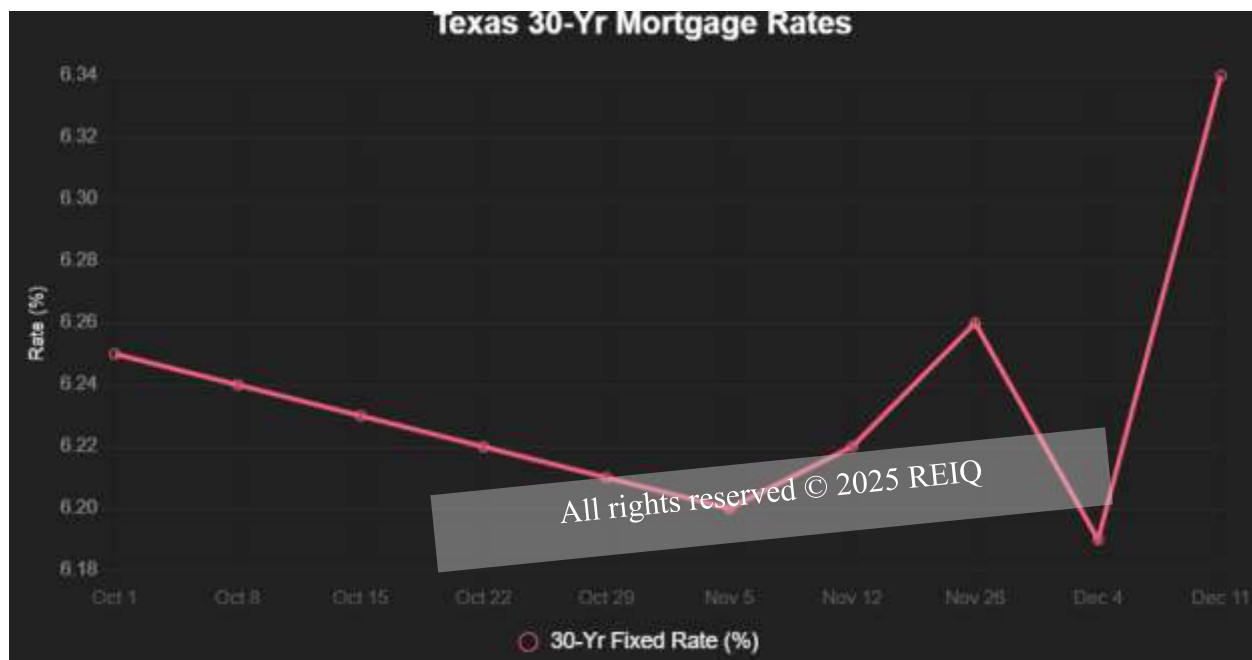
4. Lending & Borrowing Change/Trend (as of December 3, 2025)

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; Sentiment boost despite hawkish pause; seller-finance flips.

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Metric	Rate/Value	Trend/Impact
30-Yr Fixed	6.23%-6.34%	Flat/slight + WoW post-cut; eases pools, JVs 10-12%.
15-Yr Fixed	5.37-5.79%	Stable; refi taps volatile equity.
Borrowing/Refis	+5-10% / +2.3% YoY	Boosts pendings; creative amid Fed pause.

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

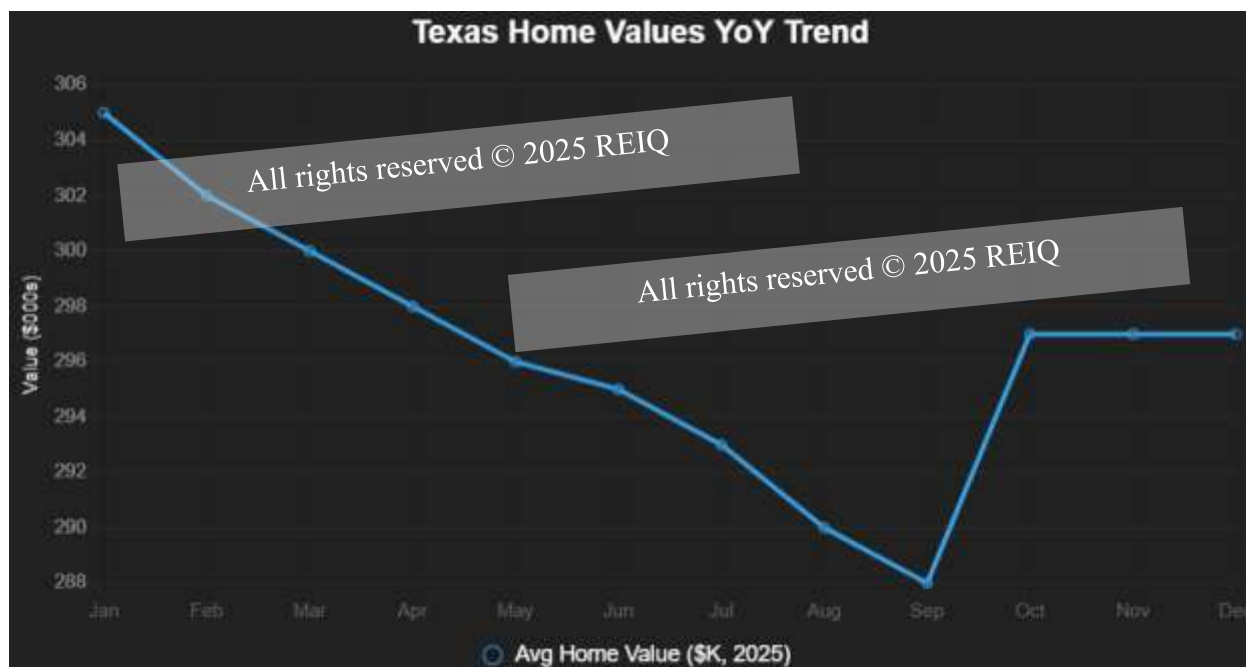


5. Wholesale Deals Change and Trend (as of December 2025)

Texas #1 wholesaling (+10-15% YoY pop/jobs); stabilizing + cut fuels leads—trend: 5-10% spreads 20-30/month, inventory +1-2%; 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; tech taps.
- **San Antonio:** +15% #1 buyer; STR hybrids 15%+.

Illustration: Statewide Home Value Trend (as of December 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 18, 2025.
Let's crush those balanced-market wins!

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