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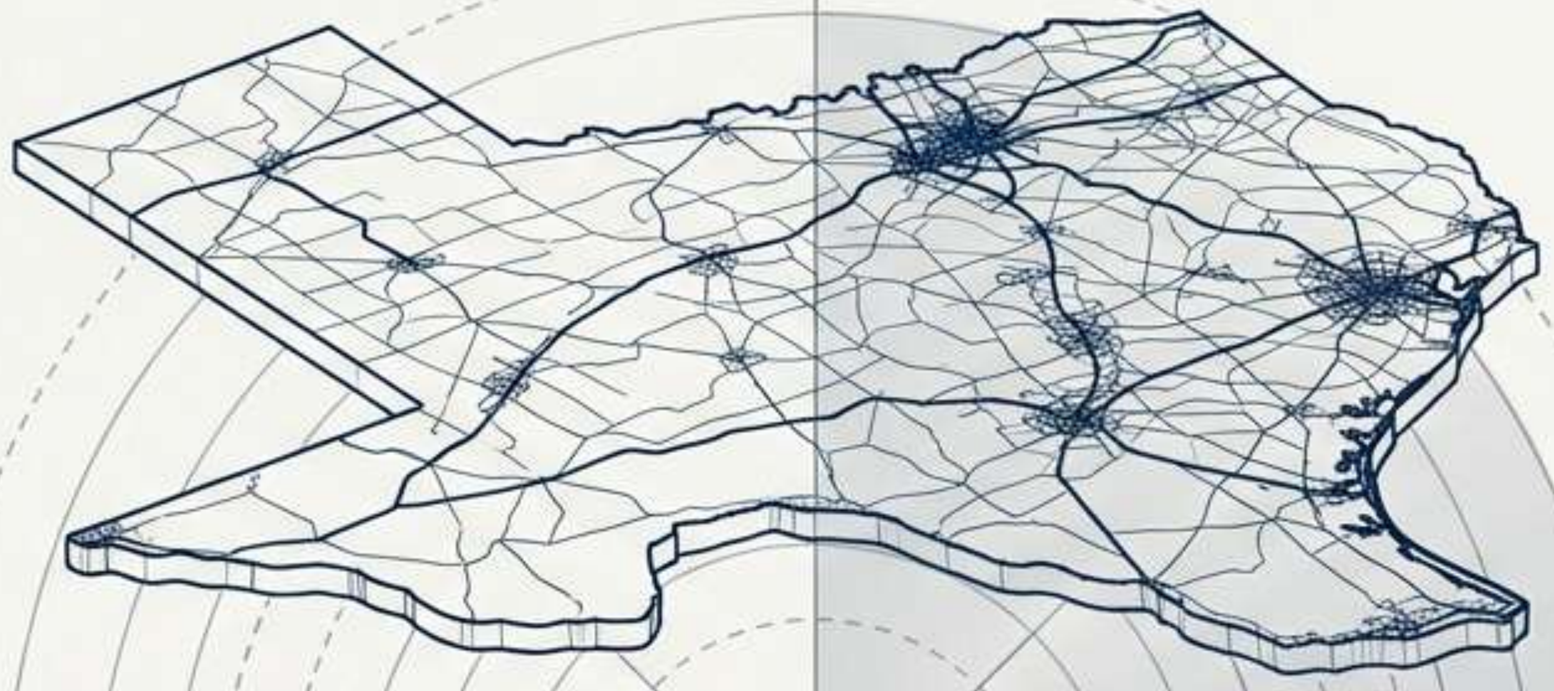


REIQ MARKET INTELLIGENCE: Q2 2026 TACTICAL BRIEFING

Navigating Macro Shocks & Unlocking Texas Real Estate Opportunities

April 9, 2026

REAL ESTATEIQ

Texas Real Estate Intelligence: Capitalizing on the 2026 Market Pivot

MACRO-ECONOMIC VOLATILITY & FINANCING: THE TRIGGER

OIL REBOUNDS TO $100/BBL

- Fragile US-Iran ceasefire & Strait of Hormuz restrictions cause 6-8% surge

STICKY INFLATION LIMITS FED RATE CUTS

- Sticky 3.0% February Core PCE
- Investors budget for **6.46%-6.50% MORTGAGE RATES** through Q2 2026

CRITICAL WATCH: "April 10 CPI" – Hot print will push rates higher

THE TEXAS MARKET SHIFT: RECORD INVENTORY & SOFTENING PRICES

RECORD INVENTORY SURGE: 291K+ ACTIVE LISTINGS

(9.5% YoY increase)

Buyer negotiation favored

PRICE SOFTENING & STRETCHING TIMELINES

-1.27% YoY it median of **$349K**

DOM up to **100 days** in corrected markets

SAN ANTONIO: THE MOST MOTIVATED SELLER MARKET

- **10%** sales volume decline
- **21.2%** contract cancellation rate

METRO OPPORTUNITY COMPARISON: INVESTMENT TACTICS

AUSTIN

-3.8% Price Change (Deepest)

+22% Wholesale Growth Proj. (Highest)

Target 90+ DOM; sub-$450K flips

DFW

-2.4% Price Change

+18% Wholesale Growth Proj.

Builder closeouts; suburban assignments

HOUSTON

-1.2% Price Change

+16% Wholesale Growth Proj.

Energy corridor; high volume assignments

SAN ANTONIO

-2.7% Price Change

+14% Wholesale Growth Proj.

Tourism foreclosures; entry-level off-market

LTR & STR INVESTMENT TRENDS

PRO TIP / SPOTLIGHT

PORT ARTHUR: #1 U.S. STR CITY FOR 2026

AirDNA names top for short-term rental; major early-mover opportunity

HOUSTON LEADS LONG-TERM RENTAL RECOVERY

+4% YoY to $1,478 median rent

2026 WORLD CUP REVENUE WINDOW

Dallas and Houston, expected to see premium STR revenue windows

THE RISING DISTRESS PIPELINE

12 CONSECUTIVE MONTHS OF FORECLOSURE INCREASES

National starts up 14% YoY

Texas and Florida account for ~25%

HARRIS COUNTY: THE TEXAS VOLUME Leader

Highest pre-foreclosure and tax lien filings

WHOLESALING STRATEGY: THE 70% ARV RULE

Target 99+ DOM, never exceed 70% After Repair Value due to rising carry costs

REAL ESTATE IQ

MACRO-TO-MICRO CHAIN REACTION: GLOBAL VOLATILITY & POLICY IMPLICATIONS

GEOPOLITICS

- US-Iran ceasefire fragile.
- Strait of Hormuz restricted.

COMMODITIES

WTI Oil rebounds sharply to **~$100–102/bbl** (Brent **~$98**).

FINANCIALS

Relief rally reverses; **Dow drops 0.2–0.4%** intraday on conflict news.
Bitcoin stable at **~$68K**; **Gold** ticks higher to **~$4,760**.

POLICY

- February **Core PCE** sticky at **3.0%** YoY.
- **Fed rate cut hopes delayed**.

SYNTHESIS TAKEAWAY: Global volatility is locking in elevated borrowing costs. The era of 'higher for longer' is the new baseline. Budget for sustained friction.

Fed Funds Rate held steady at **3.50%–3.75%.** Limited 2026 cuts expected due to oil/conflict inflation risks.

30-Year Fixed Mortgage at 6.46%
(Pushing 6.50% daily avg amid Hormuz/tariff pressures).

10-Yr Treasury elevated at **4.28%–4.34%.**

The Catalyst: Watch April 10 CPI. A hot print (>0.3% core MoM) equals prolonged elevated rates. A cool print signals a potential near-term buyer demand rally.

Synthesis Takeaway: Budget for 6.50%+ carry costs through Q2 2026. Rate stability creates a prime opportunity window for cash buyers as retail demand pauses.

SURGING SUPPLY

291K+ active listings statewide (+9.5% YoY).

Months of supply expanding to **4.8–5.9** across metros.

DROPPING VELOCITY

Sales volume off **-4.2%** to **-10%** YoY across all major metros.

Days on Market (DOM) extending to **75–100+ days.**

Days on Market (DOM) extending to **75–100+ days.**

Softening Prices: Median listing at **~$349K (-1.27%** YoY).

SYNTHESIS TAKEAWAY: Texas diverges sharply from the national rebound. We have officially entered a statewide buyer's market. Record inventory + rising distress = peak leverage for investors.

New Home Pending Contracts (5,787)

February Texas new-home pending contracts rebound to 5,787.

RATE SHOCK FALL-THROUGH

Record high cancellation rates are generating highly motivated inbound leads.

San Antonio: 21.2% (Highest vulnerability)
Houston: 16.6%
Dallas: 15.1%
Austin: 13.3%

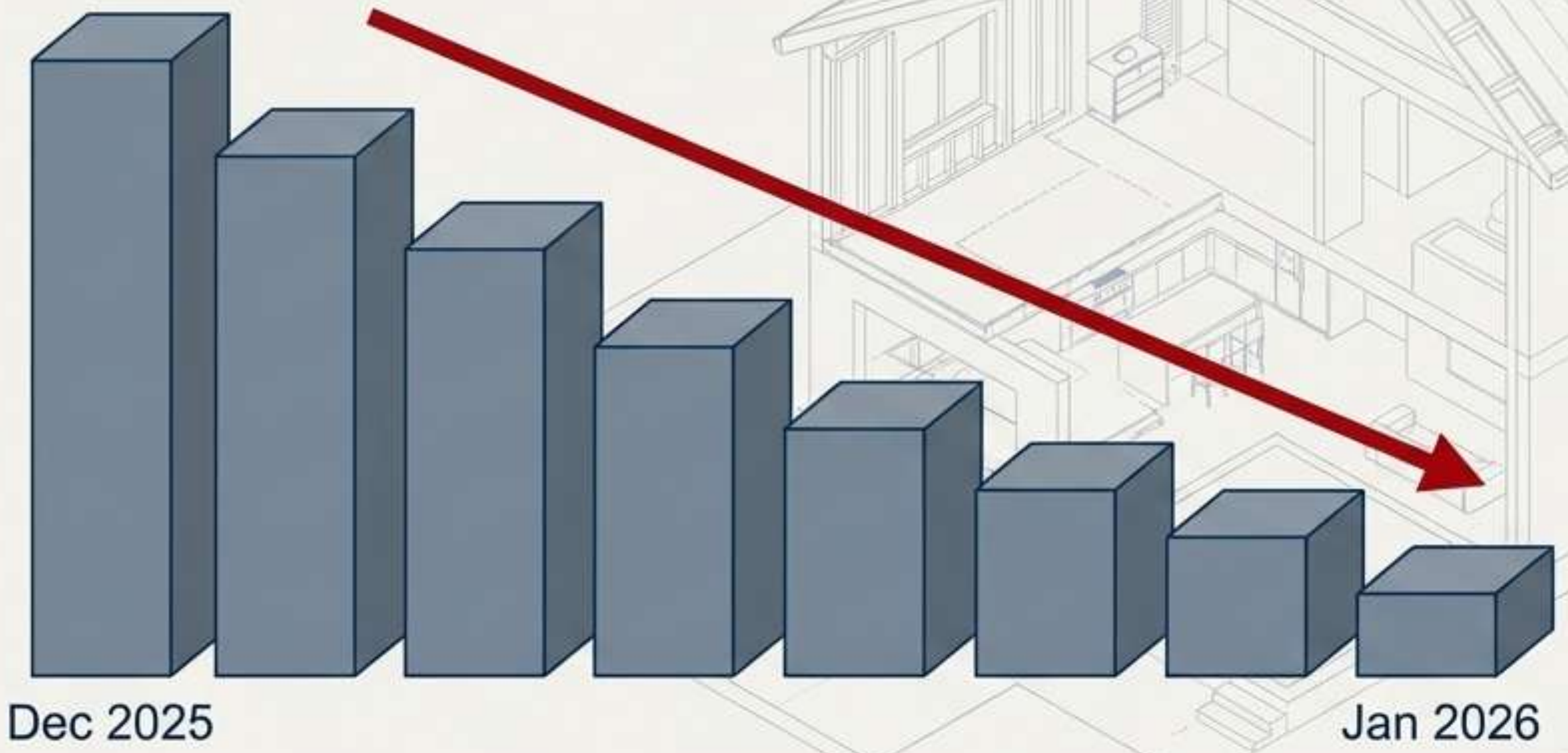
SYNTHESIS TAKEAWAY: 1 in 5 deals in San Antonio are falling through. Paired with 84+ DOM and -10% sales volume, San Antonio is the most motivated-seller market in Texas right now.

REGIONAL MARKET DIAGNOSTIC: TEXAS METRO ANALYSIS

HOUSTON	AUSTIN	SAN ANTONIO	DFW
Profile: Volume Leader. Energy/Midtown concessions.	**Profile:** Deepest Correction. 33% of listings seeing price cuts.	**Profile:** #1 Buyer's Market. Tourism foreclosures.	**Profile:** Balanced/Suburban. Strong pending rebound.
Metrics: \$334K Median | -4.2% Sales | 78+ DOM	**Metrics:** \$412K-\$518K Median | -7.1% Sales | 100 DOM	**Metrics:** \$299K-\$308K Median | -10% Sales | 84+ DOM	**Metrics:** \$350K-\$368K Median | -6.4% Sales | 73+ DOM
Wholesale Est: +16% Growth (Best for: Fast-volume failed-contract assigns)	**Wholesale Est:** +22% Growth (Best for: 90+ DOM sub-\$450K price-cut pitches)	**Wholesale Est:** +14% Growth (Best for: Entry-level off-market, highest cancellation rescues)	**Wholesale Est:** +19% Growth (Best for: Builder closeout assigns in Frisco/Collin)

SYNTHESIS TAKEAWAY: Regional divergence presents distinct investment avenues. San Antonio offers deep distress opportunities, while Austin provides high-yield correction prospects. Houston and DFW present volume and balanced rebound strategies respectively.

The National Drop: Jan 2026 building permits fell **-4.7%** MoM to **1.386M** (lowest since Aug 2025).



Texas Metro Moderation (Feb 2026 Permits):

Houston:	2,152
DFW:	1,691
Austin:	619
San Antonio:	332

Synthesis Takeaway: Falling permits equal less new-home pipeline competition in 12–18 months. This supports long-term existing-home values, while today's inventory glut provides near-term assignment leverage.

TEXAS MARKET SYNTHESIS: LTR & STR REGIONAL OUTLOOK

LTR RECOVERY (Zumper Apr 2026 Data):

Houston: Strongest recovery. +4% YoY ($1,478). Driven by **energy-sector** demand.

DFW: +3% YoY ($1,750). **Job-suburb growth (Plano, McKinney)** sustains demand.

Austin: +3% YoY. Recovering from 2025 lows, but concession-heavy leasing remains.

STR RESILIENCY:

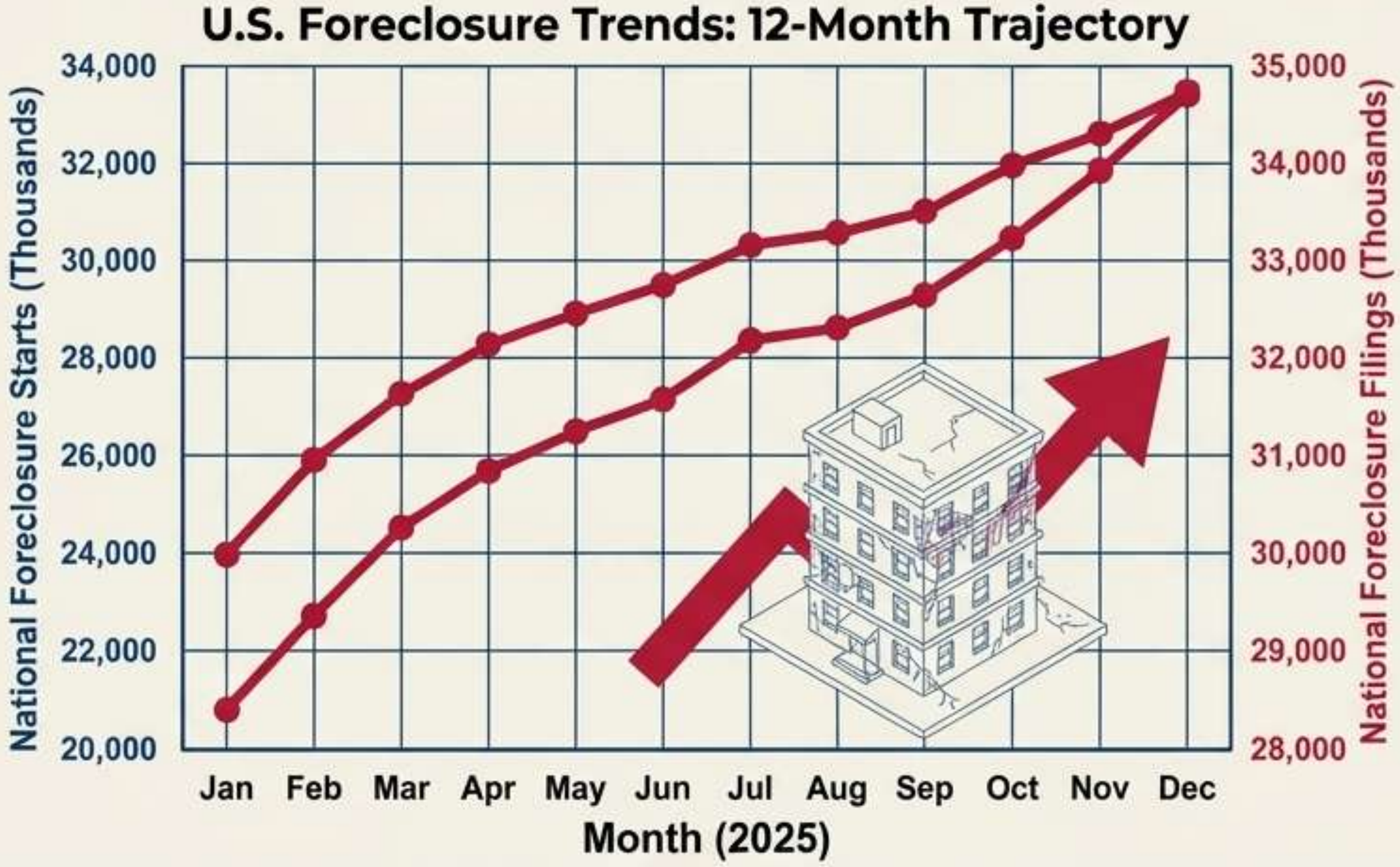
Port Arthur: ★ **Ranked #1 U.S. STR investment city for 2026** by AirDNA. Massive emerging opportunity for early movers.

DFW & Houston: Event-driven tailwinds. World Cup 2026 hosting creates premium revenue windows.

SYNTHESIS TAKEAWAY: The 2022–2024 supply wave is absorbing. Lock in ARV-supportive LTRs in job-growth suburbs, and target Port Arthur/World Cup hosts for STR alpha.

THE DISTRESSED PIPELINE EXTENDS: ATTOM data confirms the 12th consecutive month of year-over-year foreclosure increases nationally.

2025 FULL-YEAR REALITY: 367,460 national foreclosure filings (**+14%** YoY)



THE HEAVYWEIGHTS:

TEXAS: 37,215 foreclosure starts (**10th-worst** nationally).

FLORIDA: 34,336 foreclosure starts (**3rd-worst** nationally).

SYNTHESIS TAKEAWAY: Texas and Florida combined account for **~25%** of all national foreclosure starts. The distress wave is highly concentrated in our primary operating markets.

THE REIQ DATA EDGE: Direct-from-county scraping delivers fresh pre-foreclosure, tax lien, and probate data faster than raw database pulls, at a fraction of the $10-$50 per-lead cost.

REIQ WEEKLY PORTAL UPLOAD STATUS

Last Updated: October 26, 2025

Harris County: 380/391 captured. (Weekly Thu/Fri uploads)	97%	✓
Miami County: 8/44 captured. (Weekly cadence, highest FL volume)	18%	
Fort Bend County: Strong pre-auction capture volume completed.	100%	✓

SYNTHESIS TAKEAWAY:

Volume peaks in January and tapers by April/May. Acting early on freshly scraped county data is the ultimate competitive advantage in a high-distress cycle.

1. Underwrite Conservatively: Stick rigorously to the 70% ARV rule. Build in a hard buffer for 6.46%+ carry costs.

2. Target the Pain: Pitch 'cash speed' to 90+ DOM sellers. They are facing rate-induced buyer cancellations and record inventory competition.

3. Leverage the Drop: Build your cash-buyer list now. Be positioned to assign rapidly before the Fed eventually cuts rates and retail buyers return.

Call to Action: Scan the QR Code for FREE Q2 Cohort Coaching Access.

Includes: Live deal reviews, ARV sessions, and skip-trace lists.

Synthesis Takeaway: Win regardless of the April 10 CPI print. The data is clear; the opportunity is in the execution. Let's crush those distress-opportunity wins.