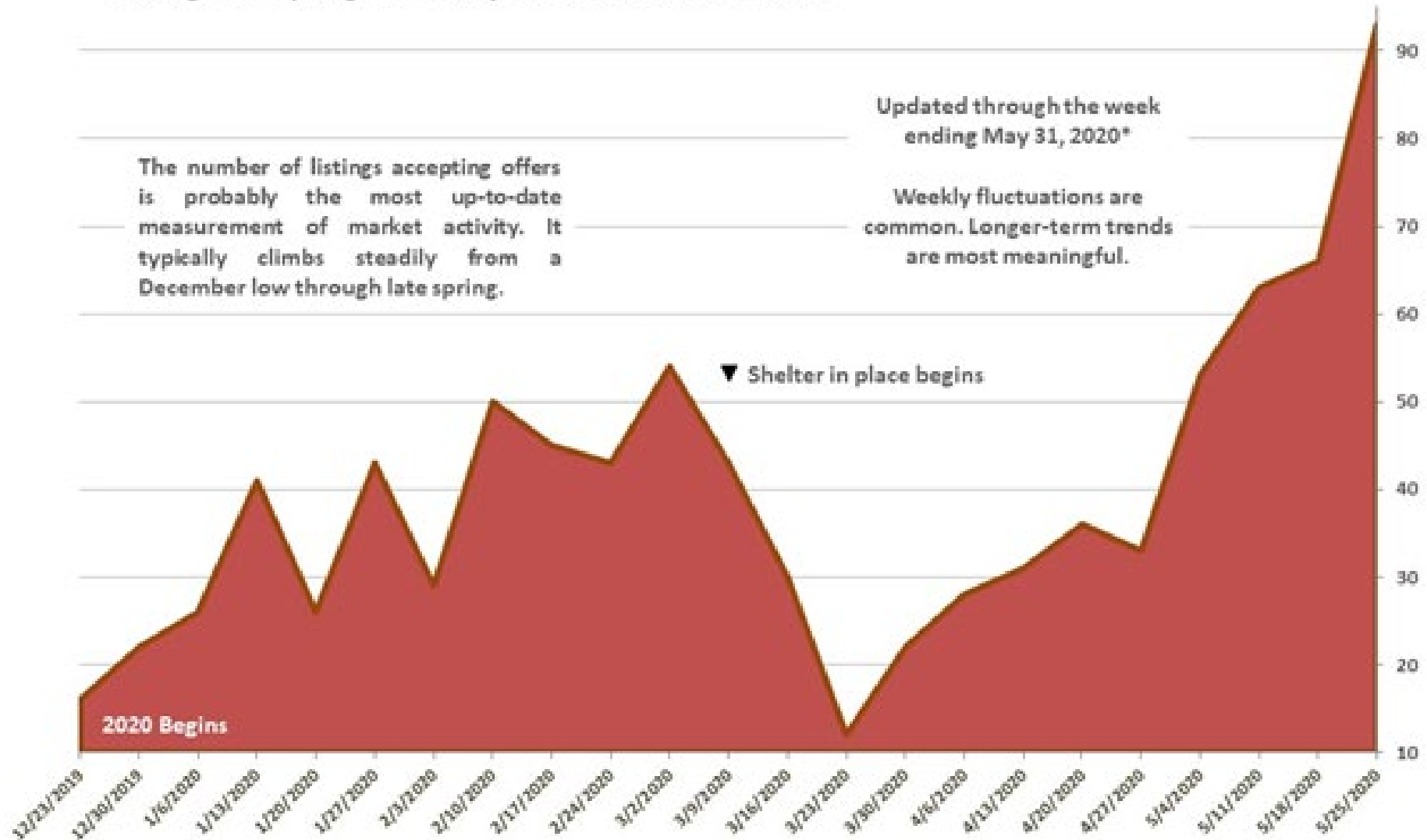


Marin County Market Dynamics by Week

Listings Accepting Offers, by Week since Mid-Winter



The number of listings accepting offers is probably the most up-to-date measurement of market activity. It typically climbs steadily from a December low through late spring.

Updated through the week ending May 31, 2020*

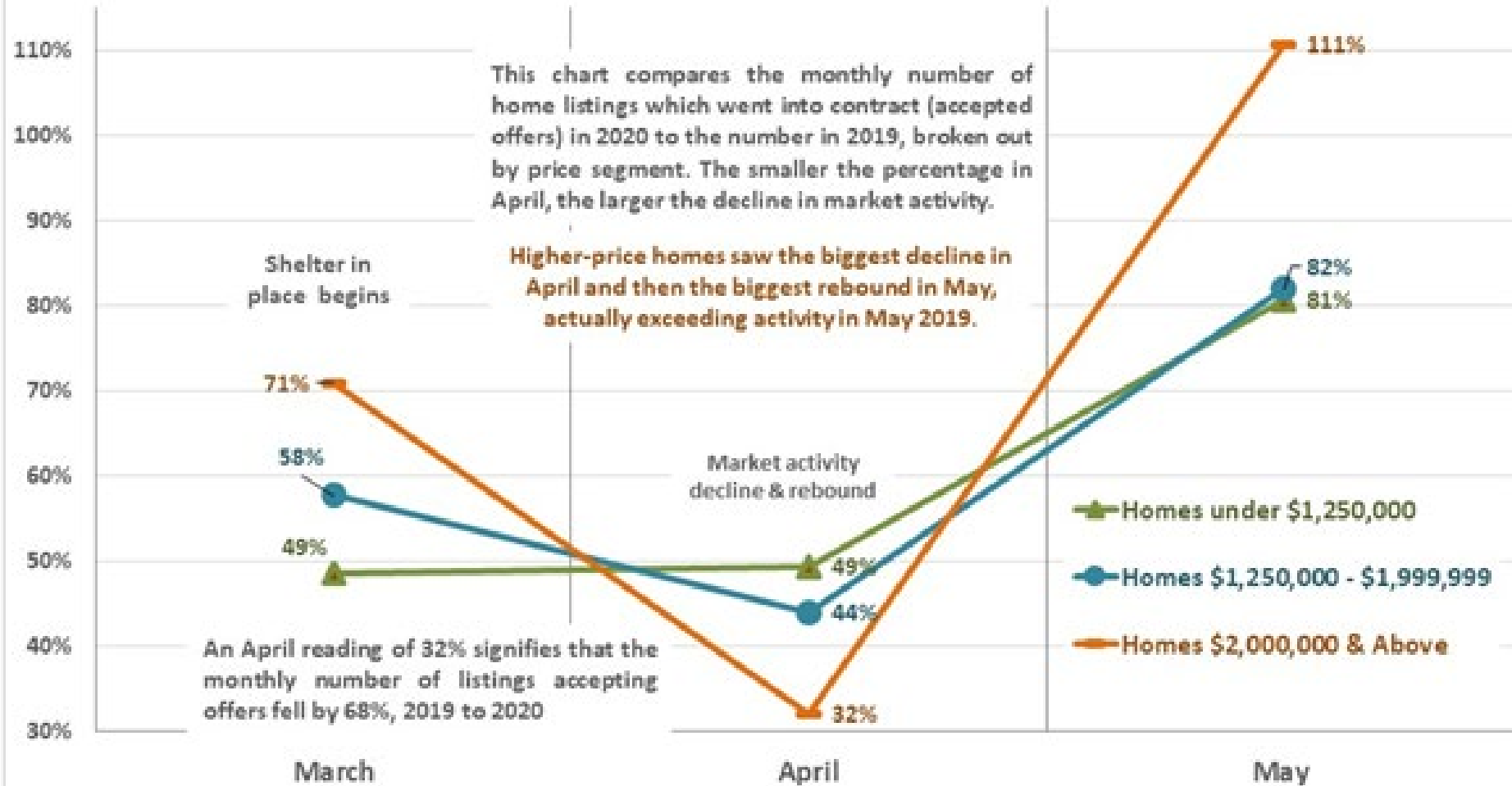
Weekly fluctuations are common. Longer-term trends are most meaningful.

* MLS reported data, per Broker Metrics. Recent weeks' data estimated using available data, and may change with late reported activity. Data from sources deemed reliable but may contain errors and subject to revision. All numbers are approximate.

Listings Accepting Offers: Homes by Price Segment

Marin County Spring Market Comparison, 2020 vs. 2019

All percentages to be considered approximate



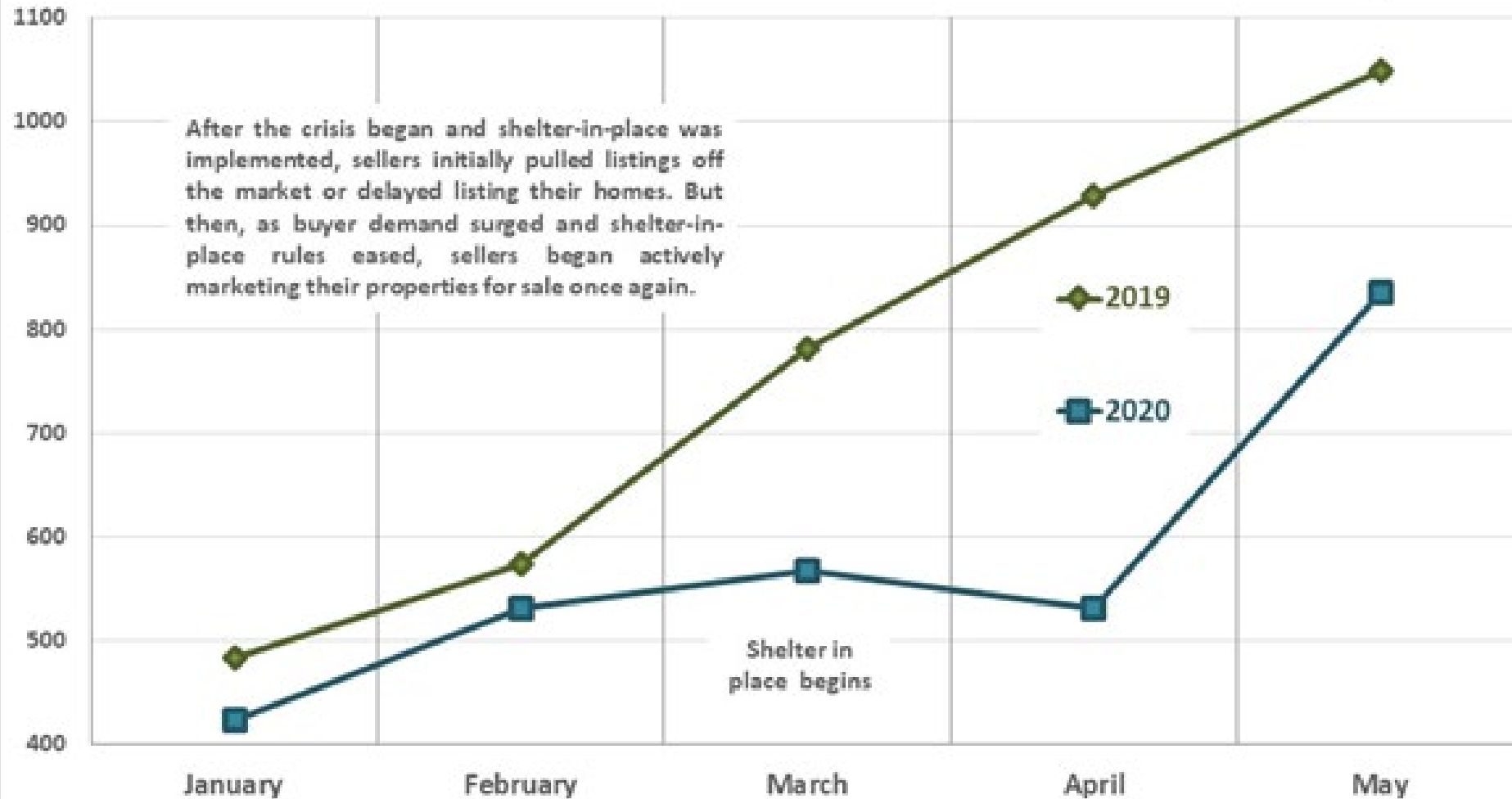
Residential activity reported to MLS, per Broker Metrics. Last month's data estimated based on available numbers, but may change with late-reported activity. Data from sources deemed reliable but may contain errors and subject to revision. All numbers to be considered approximate.

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Active Listings For Sale in Month

Marin County Spring Market Comparison, 2020 vs. 2019

All numbers and percentages to be considered approximate



Residential activity reported to MLS, per Broker Metrics. Last month's data estimated based on available numbers, but may change with late-reported activity. Data from sources deemed reliable but may contain errors and subject to revision. All numbers to be considered approximate.

Listings Closing Sale in Month

Marin County Spring Market Comparison, 2020 vs. 2019

All numbers and percentages to be considered approximate

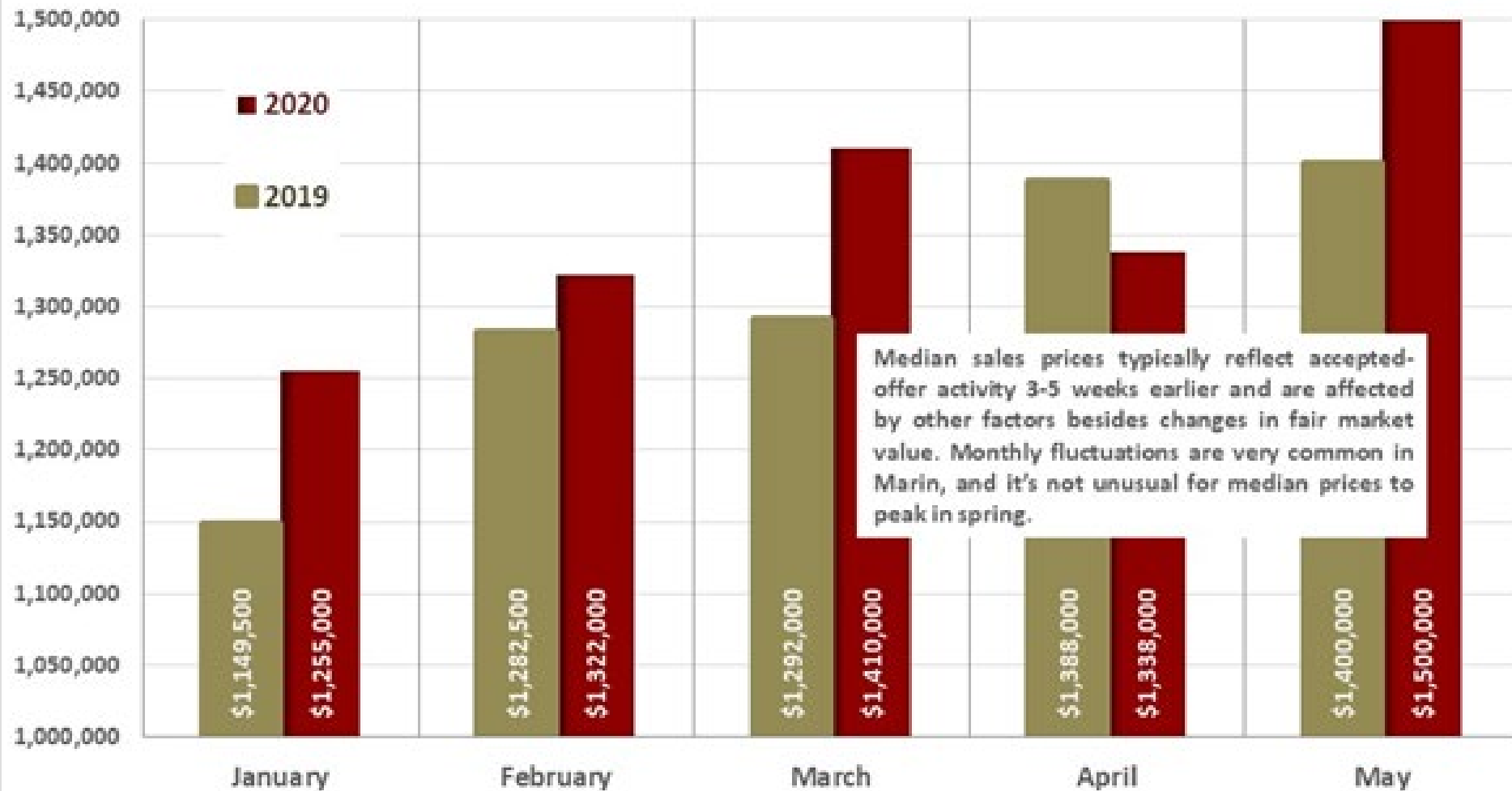


Residential activity reported to MLS, per Broker Metrics. Last month's data estimated based on available numbers, but may change with late-reported activity. Data from sources deemed reliable but may contain errors and subject to revision. All numbers to be considered approximate.

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Median House Sales Prices by Month

Marin County Year-over-Year Spring Market Comparison, 2020 vs. 2019



Residential activity reported to MLS, per Broker Metrics. Last month's data based on available numbers, but may change with late-reported activity. Data from sources deemed reliable but may contain errors and subject to revision. All numbers to be considered approximate.

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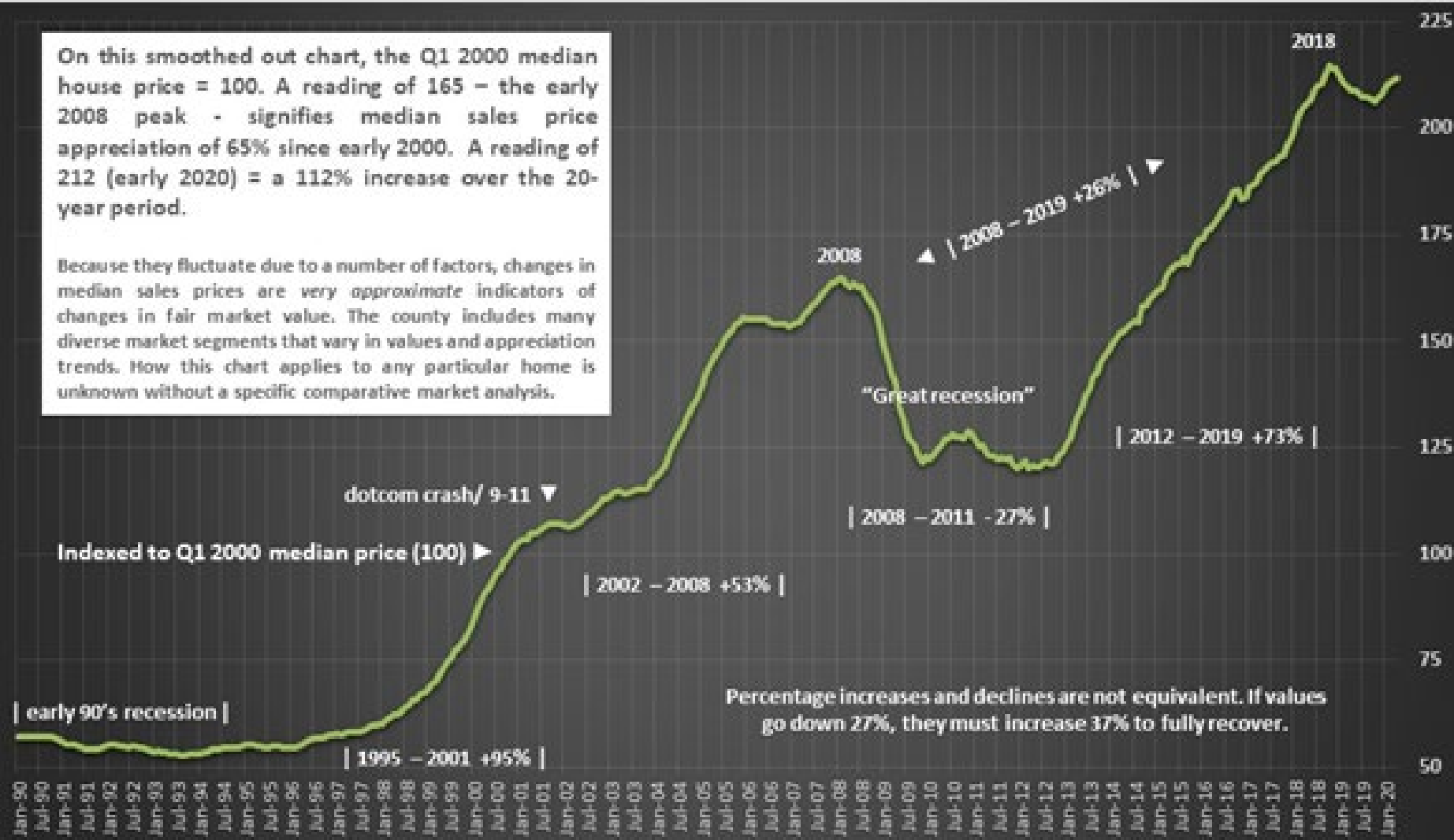
Marin County Median Home Price Appreciation since 1990

Median HOUSE Sales Price Change, Indexed to Q1 2000

Sales reported to MLS through 5/31/20.
All numbers are approximate.

On this smoothed out chart, the Q1 2000 median house price = 100. A reading of 165 - the early 2008 peak - signifies median sales price appreciation of 65% since early 2000. A reading of 212 (early 2020) = a 112% increase over the 20-year period.

Because they fluctuate due to a number of factors, changes in median sales prices are very approximate indicators of changes in fair market value. The county includes many diverse market segments that vary in values and appreciation trends. How this chart applies to any particular home is unknown without a specific comparative market analysis.

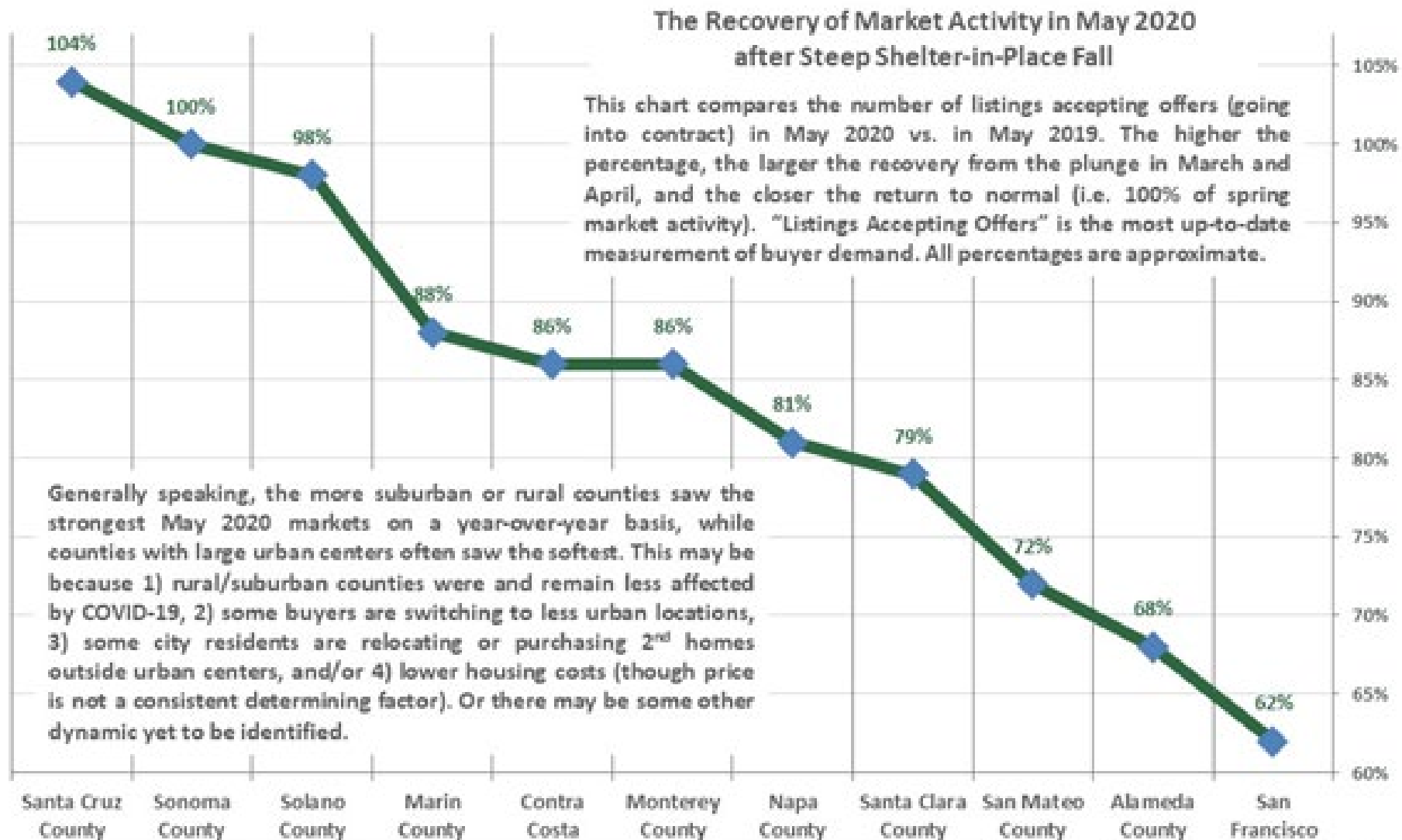


Change in monthly median house sales price, using CA Association of Realtors or MLS data, indexed to the median sales price in the first quarter of 2000, adjusted to a 12-month rolling average to smooth trend line. May contain errors and subject to revision. All numbers should be considered very approximate.

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Bay Area County Markets, May 2020 vs. May 2019

Comparing the Year-over-Year Numbers of Home Listings Accepting Offers



MLS residential activity, per Broker Metrics. These analyses were performed in good faith with data derived from sources deemed reliable, but may contain errors and are subject to revision. All numbers should be considered approximate.

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House sales reported to MLS. Data from sources deemed reliable, but may contain errors and subject to revision.

12 Months
House Sales:
May 2020 Update

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City/Region of Marin County	Median House Sales Price	Median \$ per Square Foot	Median Home Size	Median Lot Size
Belvedere	\$3,877,500	\$1306/sf	2955 sf	.24 acre
Ross	\$3,325,000	\$1037/sf	2953 sf	.48 acre
Tiburon	\$2,960,000	\$997/sf	2907 sf	.28 acre
Stinson Beach	\$2,718,000	\$1602/sf	1762 sf	.17 acre
Kentfield	\$2,318,000	\$885/sf	3027 sf	.32 acre
Larkspur	\$2,107,000	\$932/sf	2303 sf	.19 acre
Greenbrae	\$1,850,000	\$798/sf	2378 sf	.23 acre
Sausalito	\$1,767,500	\$824/sf	2066 sf	.15 acre
Mill Valley	\$1,700,000	\$835/sf	2086 sf	.19 acre
Bolinas	\$1,630,000	N/A	N/A	.46 acre
Corte Madera	\$1,493,000	\$837/sf	1804 sf	.16 acre
San Anselmo	\$1,437,500	\$680/sf	2148 sf	.18 acre
Inverness/Pt Reyes St.	\$1,322,500	\$696/sf	1702 sf	.74 acre
San Rafael – Central	\$1,250,000	\$615/sf	2059 sf	.20 acre
San Rafael – North	\$1,180,000	\$601/sf	1800 sf	.18 acre
Fairfax	\$981,000	\$633/sf	1620 sf	.19 acre
Novato	\$952,500	\$475/sf	2135 sf	.23 acre
San Geronimo Valley	\$922,500	\$462/sf	1953 sf	.4 acre
Dillon Beach	\$895,000	\$498/sf	2056 sf	.27 acre

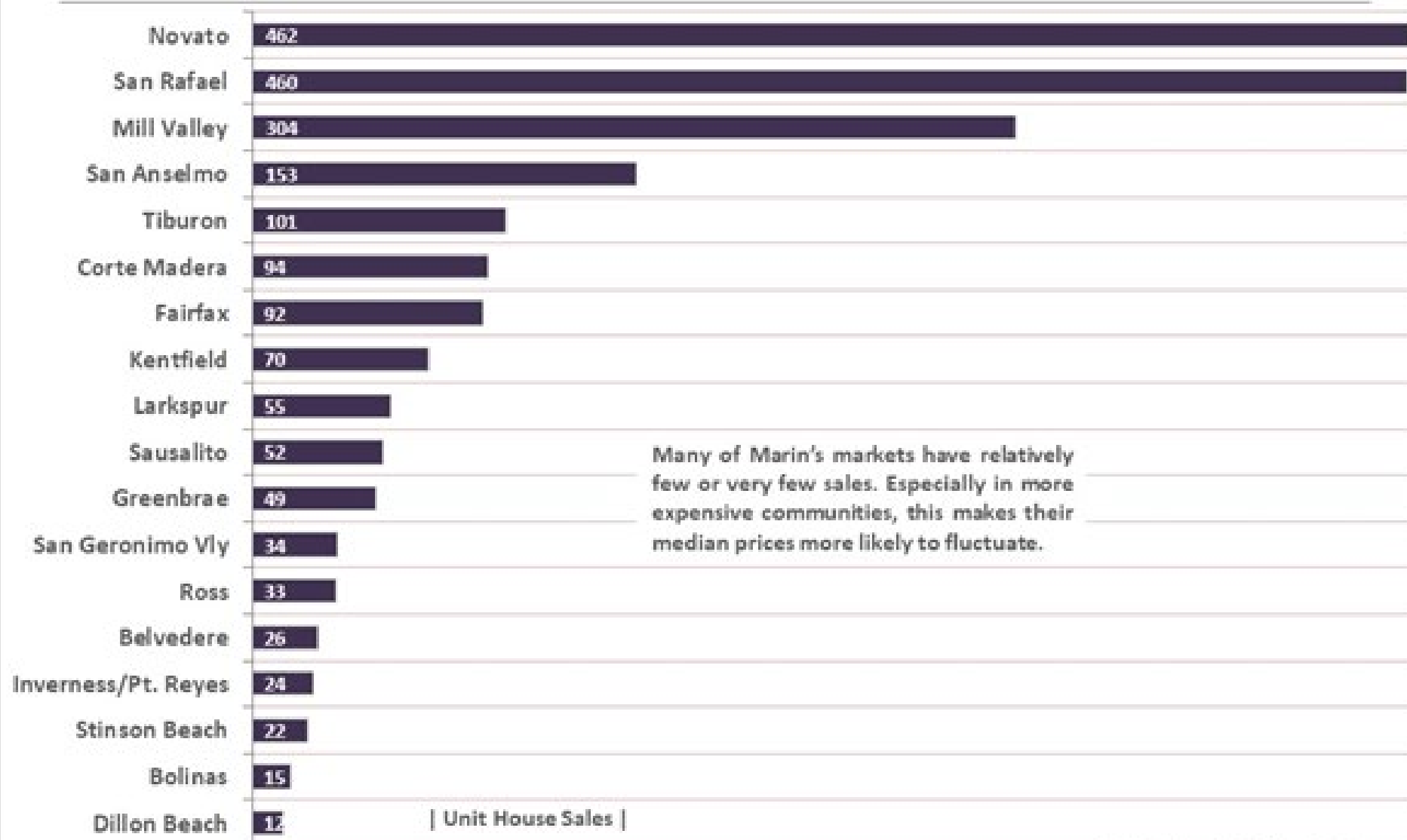
Many factors affect home values and median home prices. How these values apply to any particular home is impossible to say without a specific comparative market analysis.

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Marin County Real Estate Market

12 Months HOUSE Sales by City

May 2020 Update



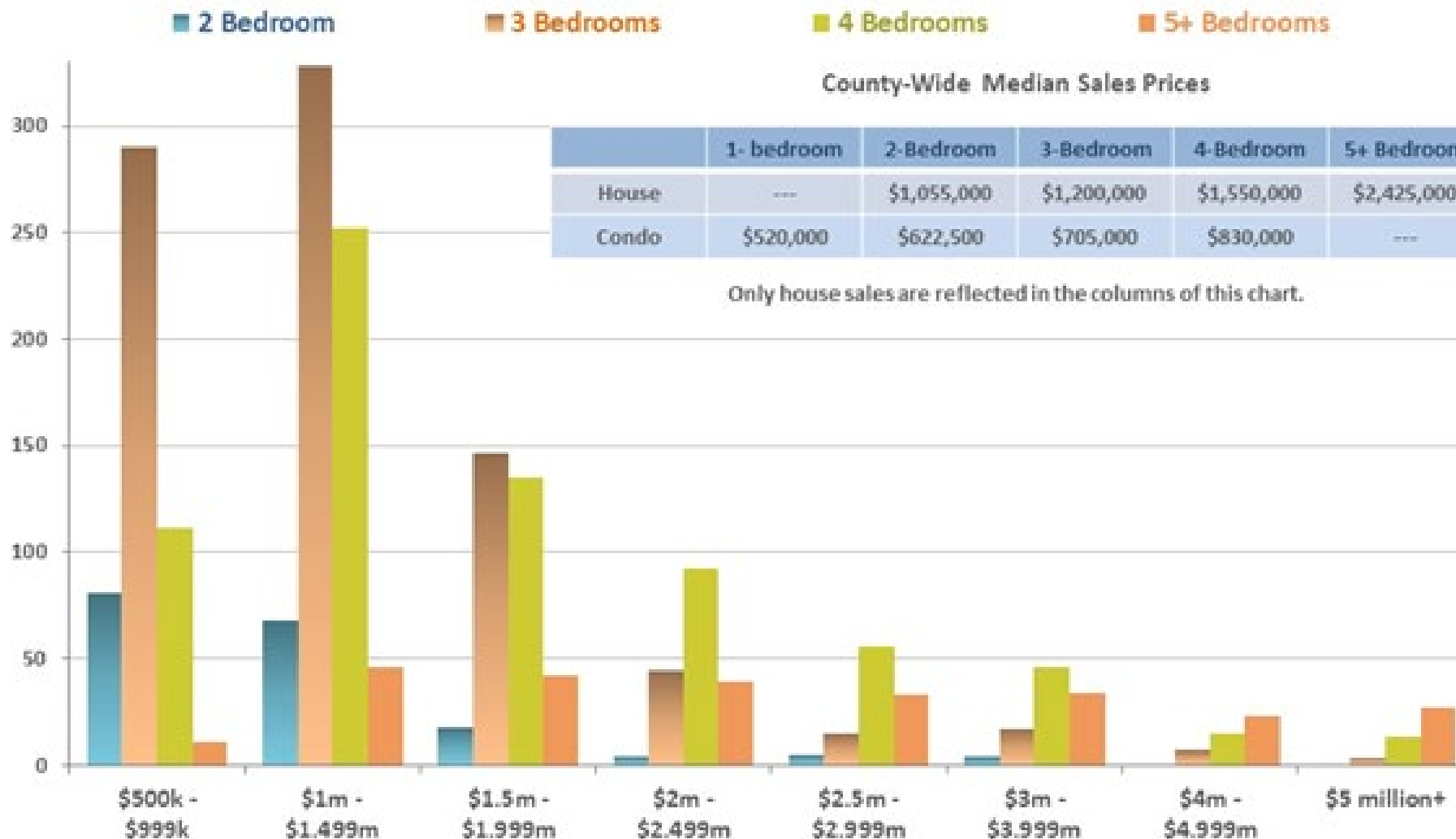
12 months house sales reported to MLS. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers are approximate.

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Marin County House Sales

12 Months Sales by Price Segment & Bedroom Count

Updated May 2020



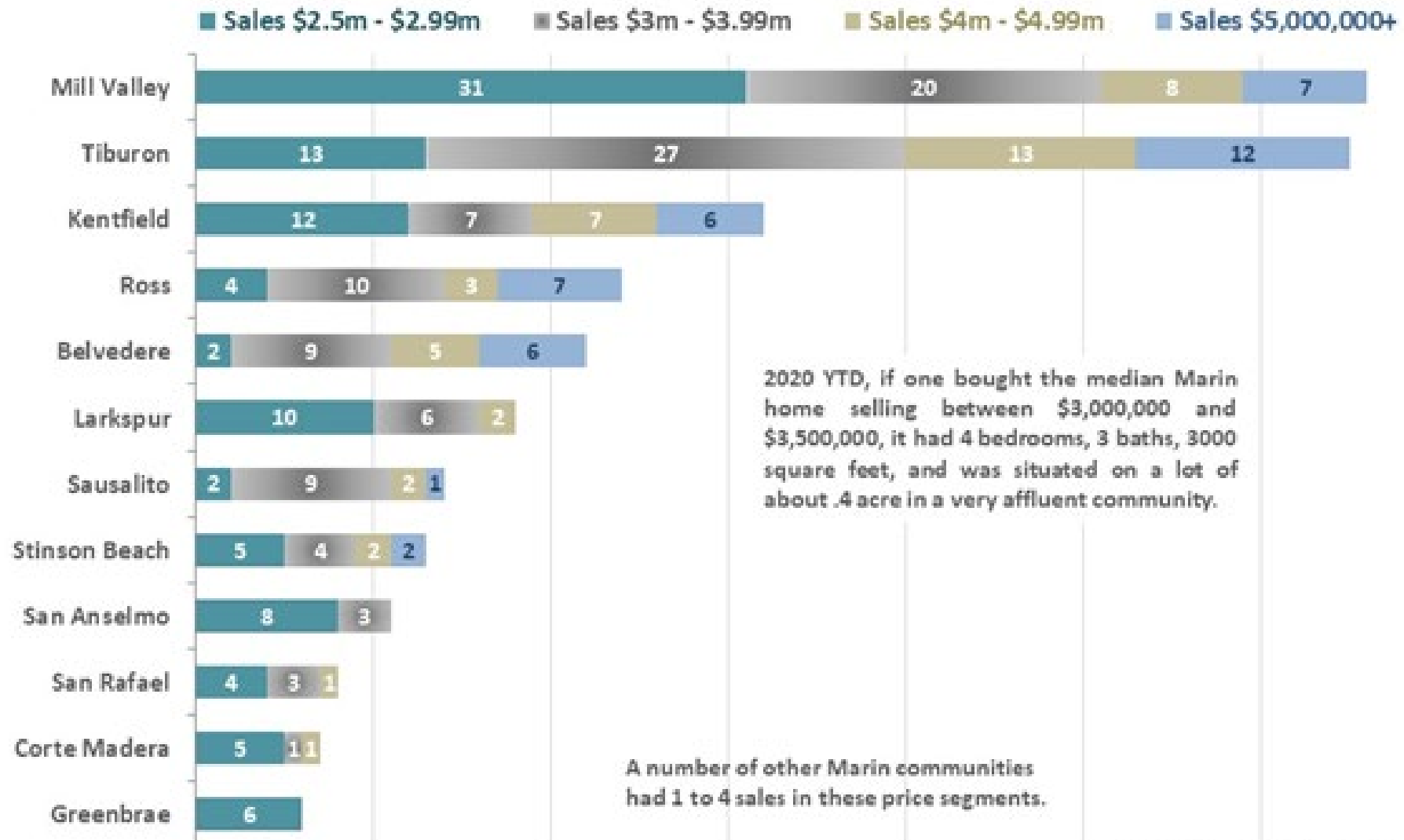
12 months MLS sales of houses. Less than 3 sales in a segment were not charted. Data derived from sources deemed reliable, but may contain errors and subject to revision. All numbers approximate.



Marin Luxury House Market

Homes Selling for \$2,500,000+ by City

May 2020 Update: 12 months sales reported to MLS



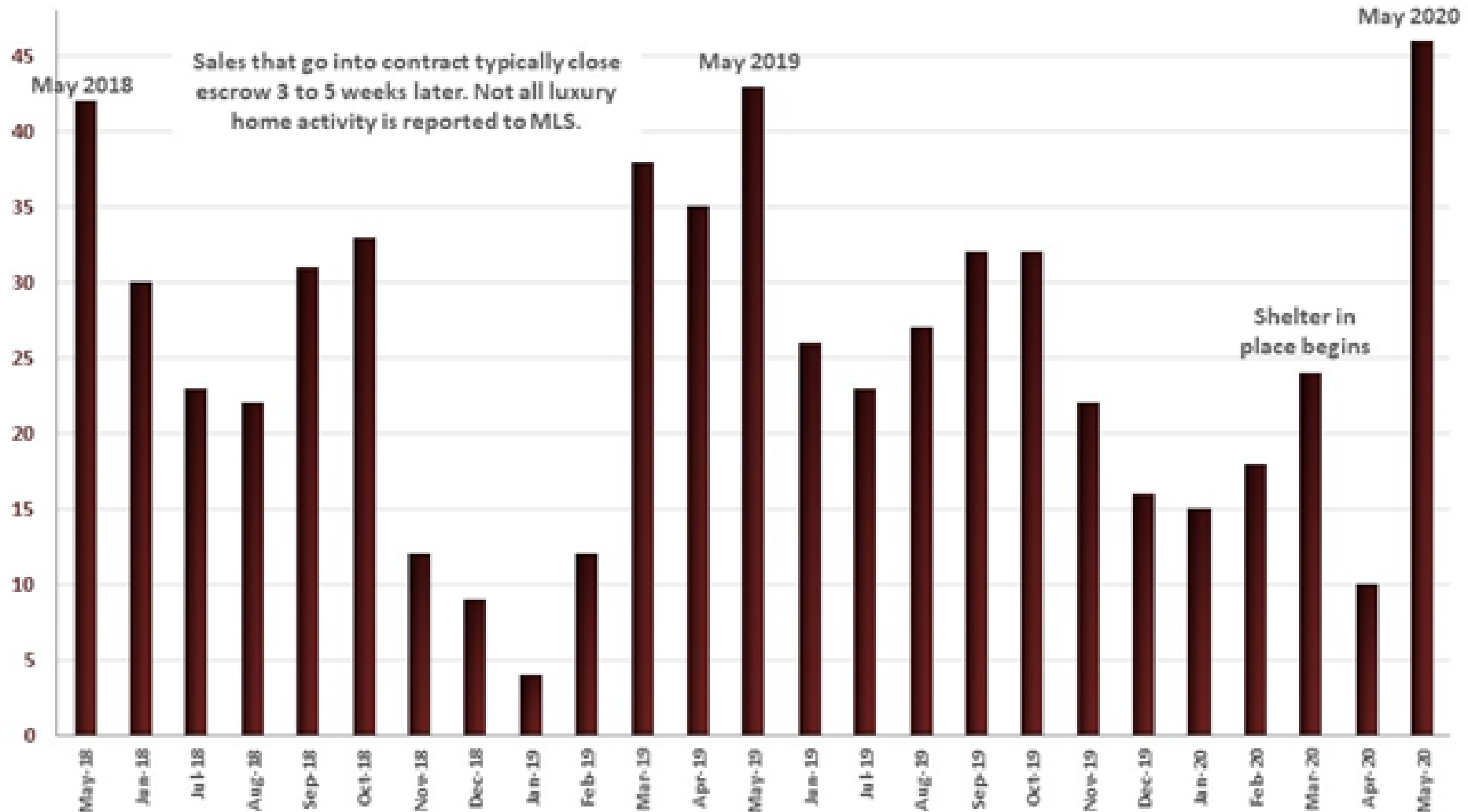
12 months sales reported to MLS. Not all luxury home sales are reported. Data from sources deemed reliable but may contain errors and subject to revision. All numbers approximate.

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Luxury Home Listings Accepting Offers

Marin County, \$2,500,000+

As reported to MLS. All numbers to be considered approximate.



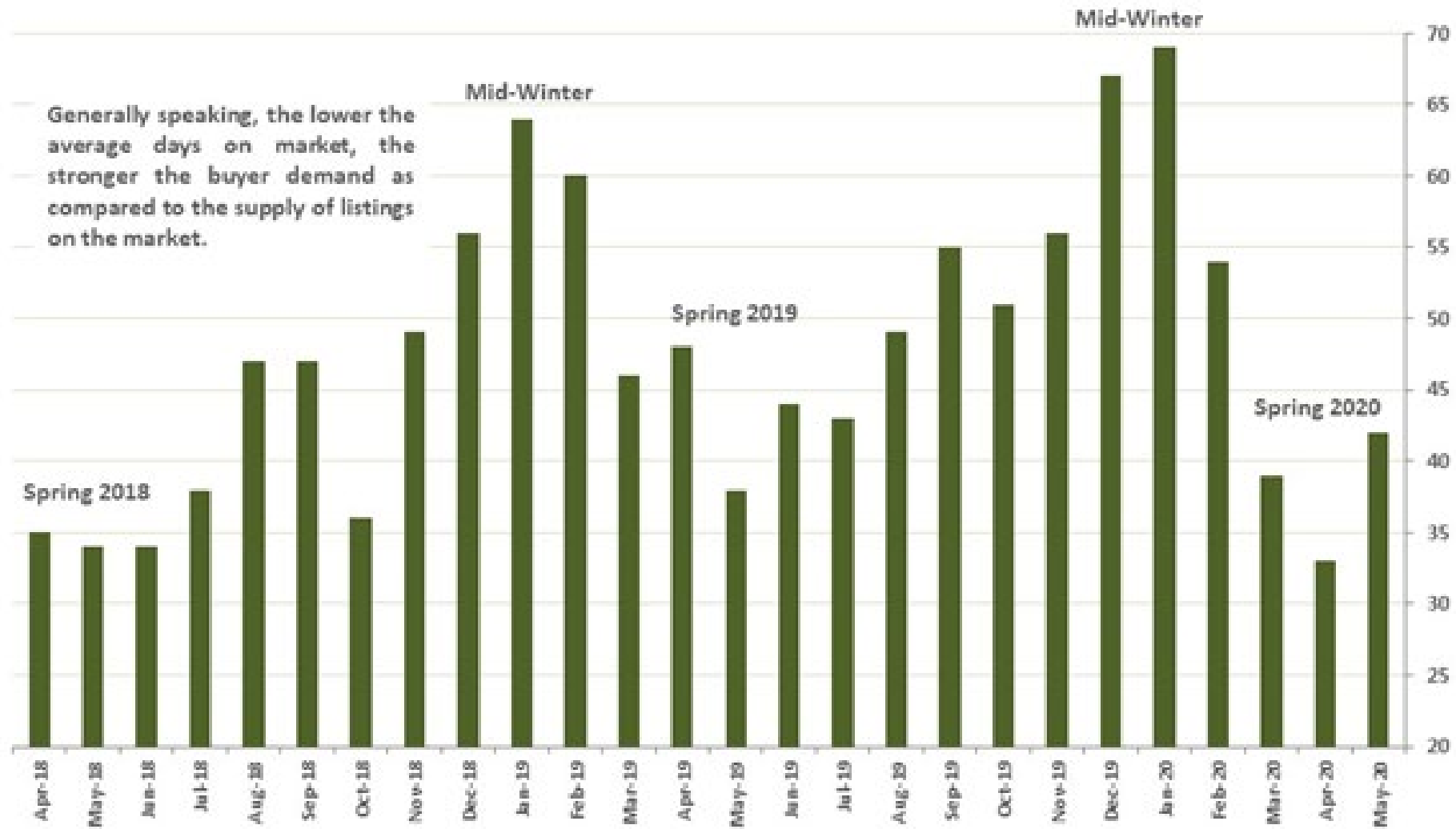
Activity reported to MLS, per Broker Metrics. Data from sources deemed reliable but may contain errors and subject to revision. All numbers should be considered approximate.

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Average Days on Market Prior to Acceptance of Offer

Marin County Market Demand & Seasonality

MLS sales of houses and condos up to \$3m, per Broker Metrics



As reported to MLS for sold listings, per Broker Metrics. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers to be considered approximate.

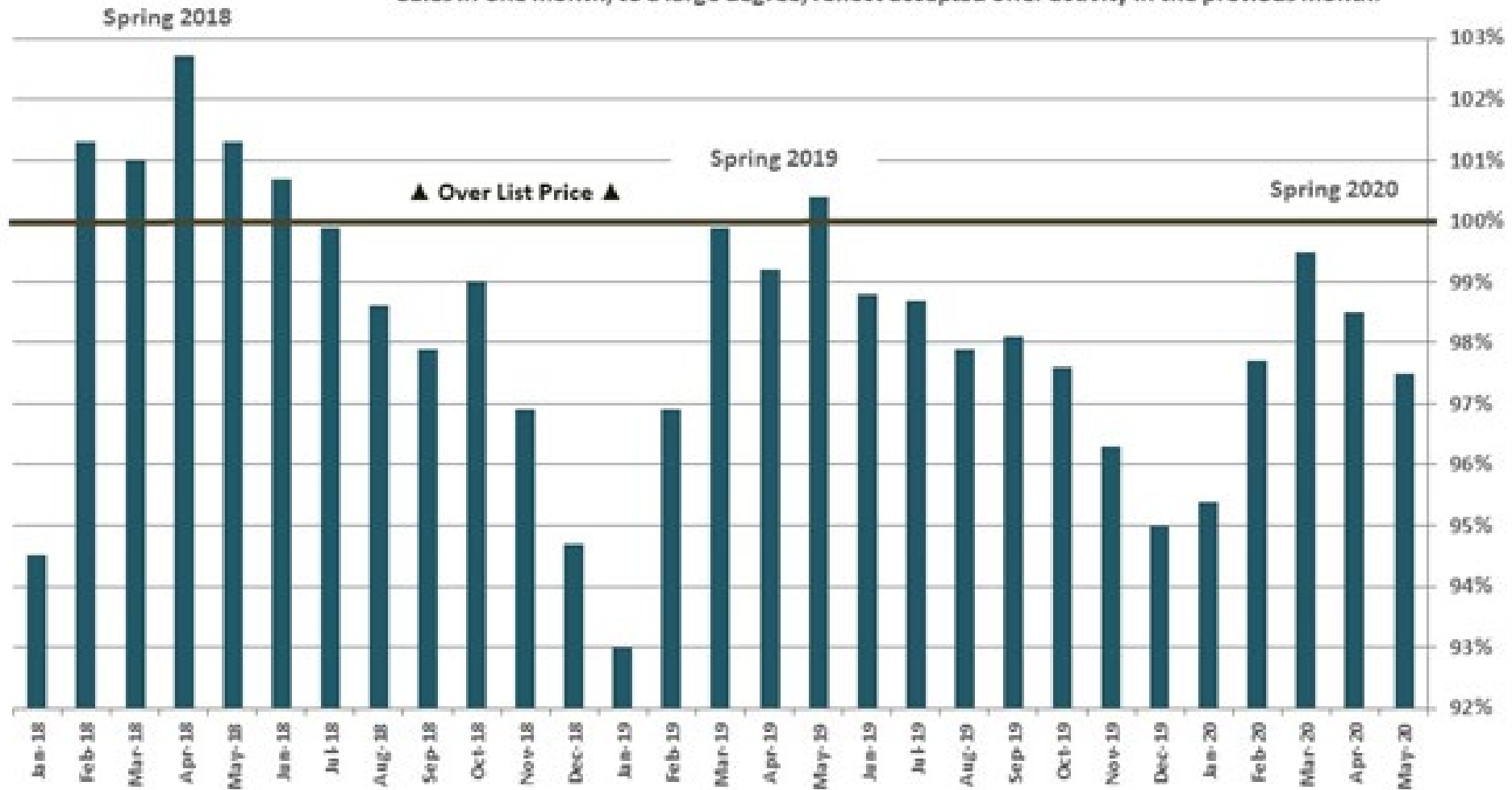
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Average Sales Price to Original List Price Percentage

Marin County Market Dynamics & Seasonality

MLS sales of houses and condos up to \$3m, per Broker Metrics

102% signifies an average sales price 2% over asking price; 96% = 4% under original asking price.
Sales in one month, to a large degree, reflect accepted offer activity in the previous month.



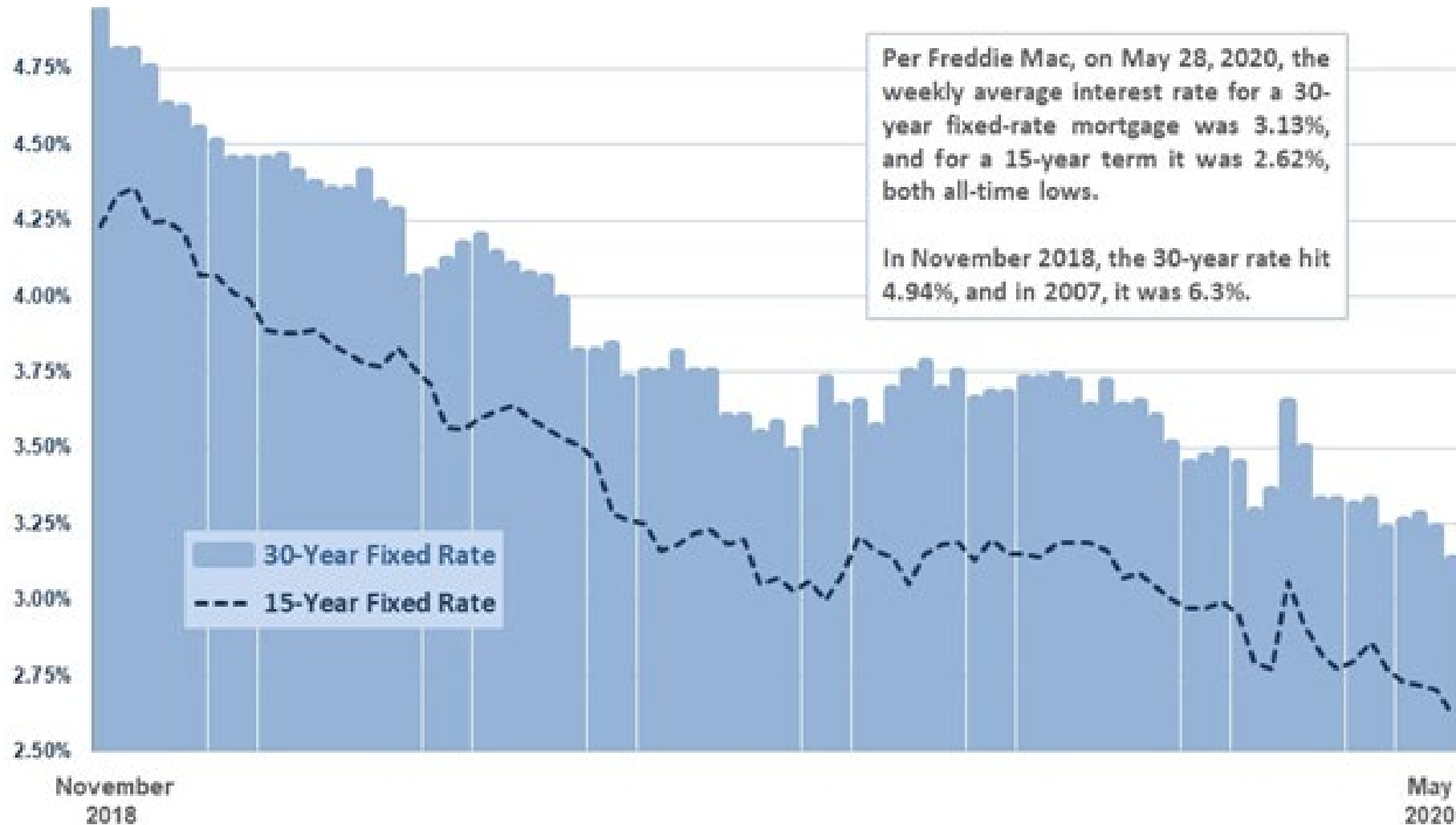
These analyses were performed in good faith with data derived from sources deemed reliable, but they may contain errors and are subject to revision. All numbers should be considered approximate.

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Mortgage Interest Rate Trends, November 2018 – May 2020

30-Year & 15-Year Conforming Fixed Rate Loans, Weekly Average Readings

Rates published
by the FHLMC



Interest rates may fluctuate suddenly and dramatically, and it is very difficult to predict rate changes. Data from sources deemed reliable but not guaranteed. Anyone interested in residential home loans should consult with a qualified mortgage professional and their accountant.

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