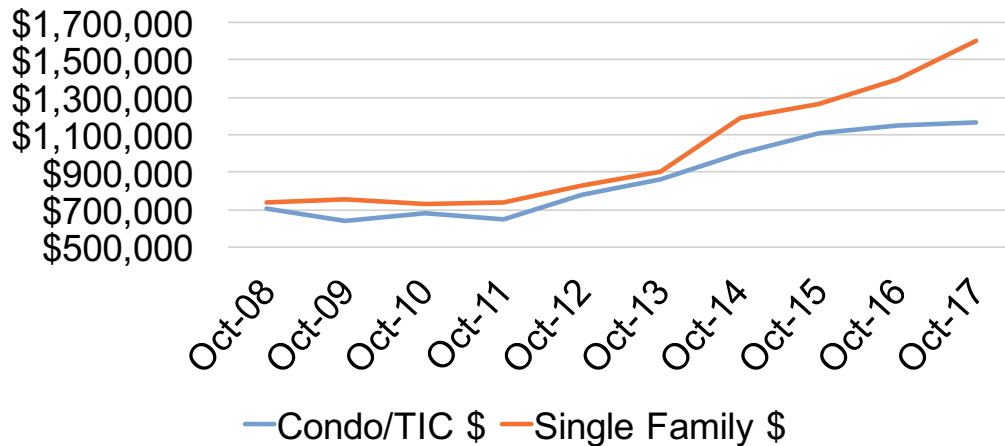


SAN FRANCISCO MARKET UPDATE NOVEMBER 2017

Single family home values have now posted a fifth straight month of double digit gains, reaching a median price of \$1.6MM for the first time. This time last year, the median home price was \$1.4MM. There has been a significant disappearance of homes sold for under \$1.1MM this year. The number of transactions in this price category have decreased by nearly 20%, as compared to last year. Much of this change has occurred in neighborhoods located in the

southern portion of the City. As an example, homes sold in MLS District 3 (Ingleside, Oceanview, Lakeside etc) have experienced substantial pressure, seeing the median price go from \$900K to nearly \$1.1MM in just one year. The Portola neighborhood has experienced similar gains, with its median now coming in at just over \$1MM. Currently, there is about a one-month supply of single family homes priced under \$1MM.



Condo/TIC

\$1,170,000

+2% year-over-year
+5% ten-year average

Single Family

\$1,600,000

+14% year-over-year
+7% ten-year average

MEDIAN NEIGHBORHOOD VALUES

Neighborhood	Condo/ TIC \$	Condo/ TIC \$/ SqFt	% Over List \$	Single- Family \$	Single- Fam \$/ SqFt	% Over List \$
Pacific/Presidio Heights	\$1,600,000	\$1,188	+1%	\$6,100,000	\$1,458	-1%
Marina/Cow Hollow	\$1,595,000	\$1,161	+8%	\$3,500,000	\$1,393	+3%
Noe Valley	\$1,342,500	\$1,149	+12%	\$2,275,000	\$1,203	+9%
Castro/Duboce Triangle	\$1,418,300	\$1,075	+10%	\$2,620,000	\$1,144	+6%
Cole Valley/Haight-Ashbury	\$1,450,000	\$1,129	+9%	\$2,963,312	\$1,139	+3%
Russian Hill*	\$1,580,000	\$1,228	+3%			
Buena Vista/Corona Heights	\$1,315,000	\$1,138	+14%	\$2,725,000	\$1,143	+6%
Nob Hill*	\$1,300,000	\$1,206	0%			
Lower Pac/Laurel Heights	\$1,387,500	\$1,080	+4%	\$2,747,500	\$1,125	+2%
Alamo Square/NOPA	\$1,235,000	\$988	+14%	\$1,950,000	\$1,130	+12%
Mission Bay	\$1,260,000	\$1,095	+2%			
Mission Dolores	\$1,175,000	\$1,142	+9%			
Hayes Valley	\$1,342,000	\$1,100	+8%	\$2,400,000	\$1,000	+5%
Mission	\$1,025,000	\$1,046	+3%	\$1,717,500	\$940	+9%
South Beach/Yerba Buena	\$1,150,000	\$1,163	0%			
Telegraph Hill	\$1,199,500	\$1,057	+6%			
Dogpatch	\$1,235,000	\$923	+4%			
North Beach/Fisherman's	\$1,075,000	\$1,066	0%			
Potrero Hill	\$1,180,500	\$1,112	+2%	\$1,812,500	\$1,130	+14%
Bernal Heights/Glen Park	\$980,000	\$983	+8%	\$1,500,000	\$1,038	+17%
Richmond	\$1,128,000	\$897	+10%	\$1,625,000	\$859	+18%
Sunset	\$940,750	\$836	+17%	\$1,375,000	\$886	+27%
SOMA	\$990,000	\$929	0%			
Bayview/Hunters Point	\$700,000	\$609	0%	\$825,000	\$603	+9%
Excelsior/Portola				\$1,015,000	\$745	+20%
Diamond Heights	\$830,000	\$817	+8%	\$1,912,500	\$970	+20%
Westwood Park/Sunnyside				\$1,312,500	\$908	+18%
Ingleside Terrace/Lakeside				\$1,825,000	\$899	+23%