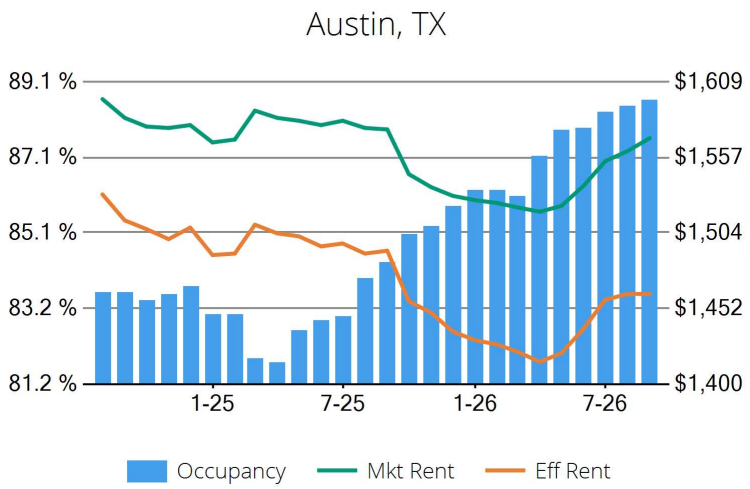
Austin, TX

End of September, 2026

General Overview

Conventional Properties	Sep 2026	Annual Chg
Occupancy	88.6	+3.6%
Unit Change	7,557	
Units Absorbed (Annual)	15,667	
Average Size (SF)	887	+0.7%
Asking Rent	$1,570	-0.1%
Asking Rent per SF	$1.77	-0.8%
Effective Rent	$1,462	-1.7%
Effective Rent per SF	$1.65	-2.3%
% Offering Concessions	60%	+19.6%
Avg. Concession Package	10.7%	+4.1%



Market Breakdown

Property Type	% of Market	# Props	# Units	Occ.	Avg SF	Average Rent Mkt	Average Rent Eff	Rent Concessions Props Offering	Rent Concessions Avg Package
Conventional	70%	1,478	296,215	88.6%	887	$1,570	$1,462	60.1%	10.7%
Affordable	20%	440	84,479	83.4%	888	$1,445	$1,335	53.7%	12.3%
Senior Living	5%	161	20,153	87.5%	833	$2,232	$2,155	30.5%	12.3%
Student Housing	5%	158	20,871	87.7%	1,037	$2,786	$2,753	17.8%	6.1%
Totals		**2,237**	**421,718**						

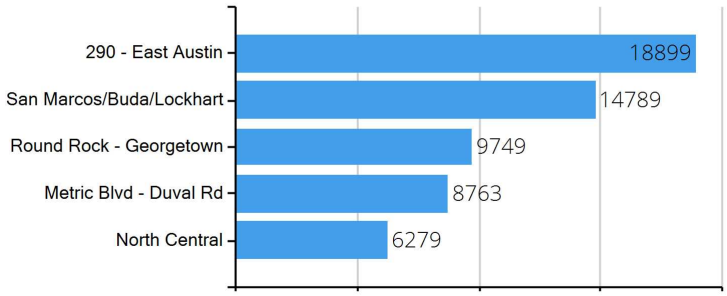
Top 5 Submarkets

Occupancy Annual Change	Sep-26	Change
Hutto - Taylor	75.5%	36.4%
Elgin - Bastrop	93.4%	24.0%
Marble Falls / Burnet County	65.9%	14.6%
290 - East Austin	87.3%	12.1%
Metric Blvd - Duval Rd	90.4%	11.9%

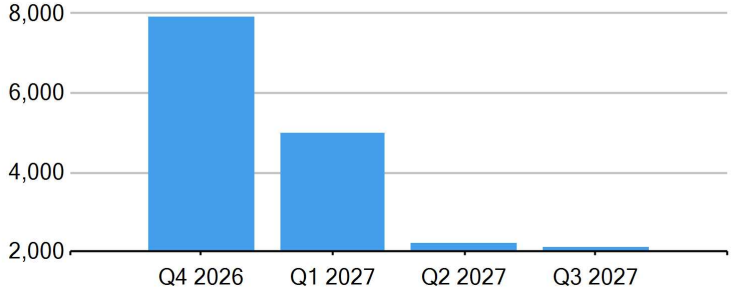
Effective Rent Gains	Sep-26	Change
Marble Falls / Burnet County	$1,432	3.7%
Downtown	$3,652	3.6%
North Central	$1,338	0.9%
South Mopac - Barton Creek - Southwest Austin	$1,663	0.8%
Bee Caves - Westlake - Rollingwood	$1,753	0.8%

New Units

Top 5 Submarkets with Most New Units in Pipeline



Leasing Starts Next 4 Quarters



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