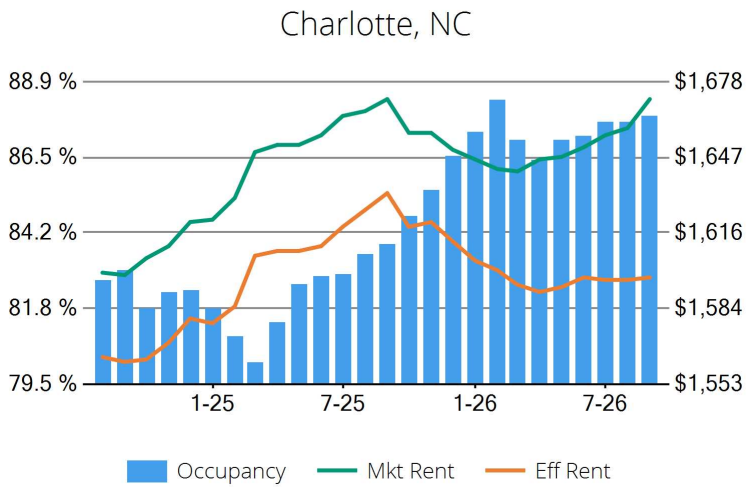
Charlotte, NC

End of September, 2026

General Overview

Conventional Properties	Sep 2026	Annual Chg
Occupancy	87.8	+4.2%
Unit Change	11,795	
Units Absorbed (Annual)	18,865	
Average Size (SF)	962	+0.3%
Asking Rent	$1,671	0.0%
Asking Rent per SF	$1.74	-0.3%
Effective Rent	$1,597	-2.1%
Effective Rent per SF	$1.66	-2.4%
% Offering Concessions	35%	+56.5%
Avg. Concession Package	10.9%	+17.1%



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	82%	1,307	254,607	87.8%	962	$1,671	$1,597	35.2%	10.9%
Affordable	11%	397	34,988	89.3%	953	$1,147	$1,144	2.8%	6.8%
Senior Living	6%	228	18,512	83.4%	858	$2,049	$2,020	9.2%	9.3%
Student Housing	1%	25	4,111	84.9%	1,127	$2,519	$2,503	10.0%	7.6%
Totals		**1,957**	**312,218**						

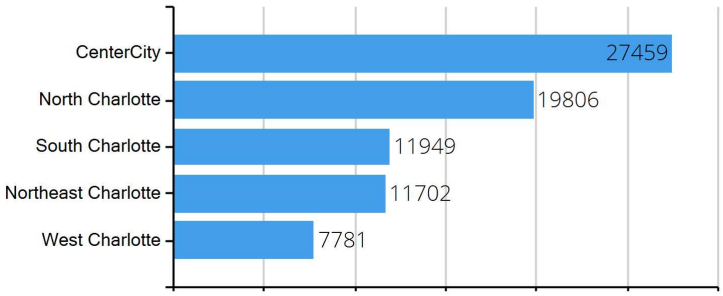
Top 5 Submarkets

Occupancy Annual Change	Sep-26	Change
Union County	91.8%	26.3%
CenterCity	86.1%	14.3%
North Charlotte	87.7%	9.0%
Salisbury	87.1%	4.2%
Gastonia/Mt. Holly	92.0%	4.0%

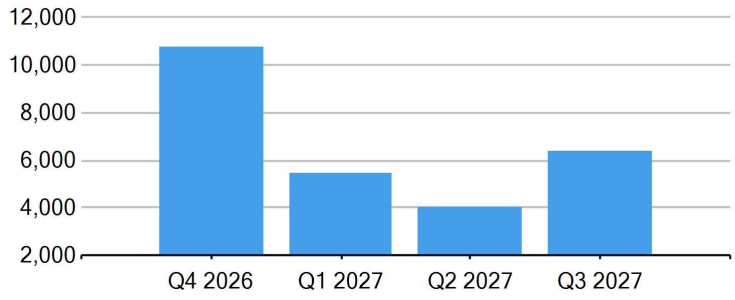
Effective Rent Gains	Sep-26	Change
Stanly County	$891	125.9%
Hickory/Newton/Lenoir	$1,432	3.4%
Salisbury	$1,277	1.9%
Rock Hill	$1,545	1.1%
Concord/Kannapolis	$1,559	0.8%

New Units

Top 5 Submarkets with Most New Units in Pipeline



Leasing Starts Next 4 Quarters



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