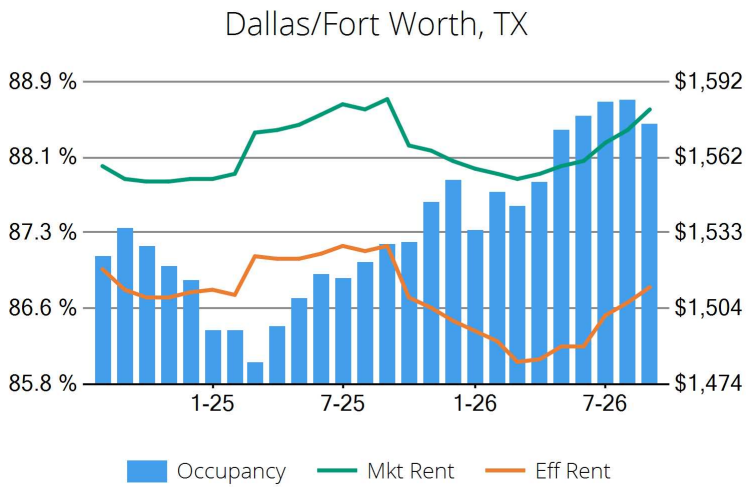
Dallas/Fort Worth, TX

End of September, 2026

General Overview

Conventional Properties	Sep 2026	Annual Chg
Occupancy	88.4	+1.0%
Unit Change	26,758	
Units Absorbed (Annual)	31,162	
Average Size (SF)	889	+0.5%
Asking Rent	$1,581	-0.2%
Asking Rent per SF	$1.78	-0.7%
Effective Rent	$1,512	-1.0%
Effective Rent per SF	$1.70	-1.4%
% Offering Concessions	46%	+4.4%
Avg. Concession Package	8.8%	+12.9%



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%	4,495	913,749	88.4%	889	$1,581	$1,512	46.0%	8.8%
Affordable	11%	750	125,790	84.7%	916	$1,343	$1,295	29.9%	9.8%
Senior Living	5%	534	59,179	86.9%	848	$1,906	$1,856	23.6%	10.4%
Student Housing	1%	84	14,405	88.4%	957	$1,965	$1,944	10.5%	9.0%
Totals		**5,863**	**1,113,123**						

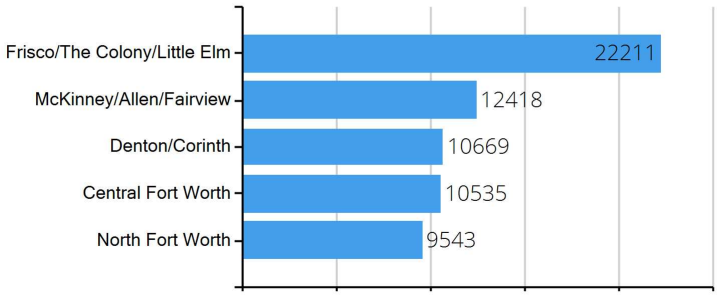
Top 5 Submarkets

Occupancy Annual Change	Sep-26	Change
North Fort Worth	87.7%	8.4%
Carrollton North/Hebron	90.1%	6.5%
Oak Lawn/RiverFront/Medical Dist.	90.3%	6.4%
Garland Central	88.2%	5.9%
Southeast Dallas	88.7%	4.5%

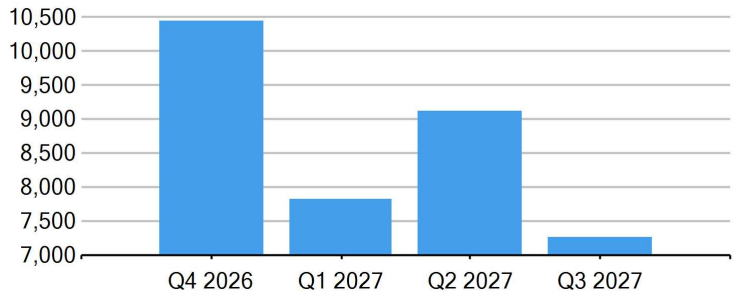
Effective Rent Gains	Sep-26	Change
Uptown/Downtown/Park Cities	$2,875	5.5%
Carrollton South	$1,536	2.5%
South Fort Worth	$1,345	2.2%
South Arlington	$1,520	1.9%
Las Colinas/Valley Ranch	$1,757	1.4%

New Units

Top 5 Submarkets with Most New Units in Pipeline



Leasing Starts Next 4 Quarters



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