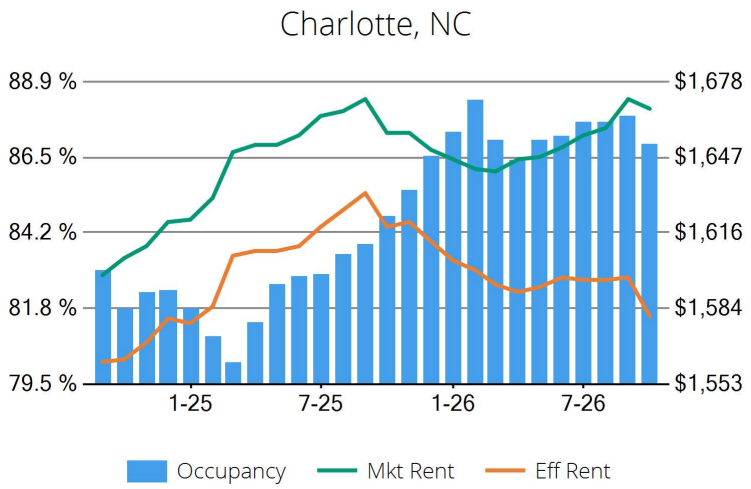
Charlotte, NC

End of October, 2026

General Overview

Conventional Properties	Oct 2026	Annual Chg
Occupancy	86.9	+3.4%
Unit Change	11,454	
Units Absorbed (Annual)	16,907	
Average Size (SF)	962	+0.3%
Asking Rent	$1,667	+0.6%
Asking Rent per SF	$1.73	+0.2%
Effective Rent	$1,581	-2.4%
Effective Rent per SF	$1.64	-2.7%
% Offering Concessions	40%	+78.3%
Avg. Concession Package	11.1%	+20.8%



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	81%	1,311	254,958	86.9%	962	$1,667	$1,581	39.7%	11.1%
Affordable	11%	400	35,704	88.1%	951	$1,156	$1,147	4.1%	11.2%
Senior Living	6%	228	18,512	83.3%	858	$2,033	$1,989	13.3%	9.3%
Student Housing	1%	25	3,990	87.7%	1,152	$2,529	$2,529	0.0%	0.0%
Totals		**1,964**	**313,164**						

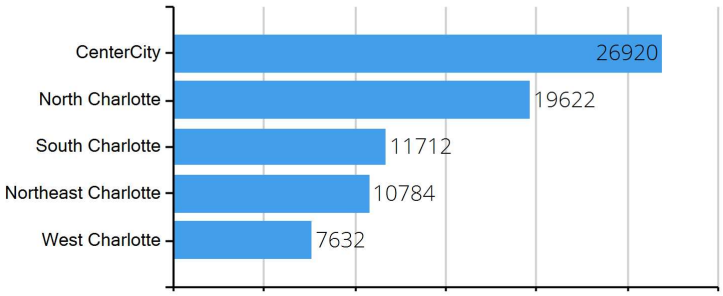
Top 5 Submarkets

Occupancy Annual Change	Oct-26	Change
Union County	87.7%	20.8%
North Charlotte	87.2%	10.8%
CenterCity	84.7%	10.3%
Salisbury	87.8%	7.0%
Gastonia/Mt. Holly	90.8%	3.6%

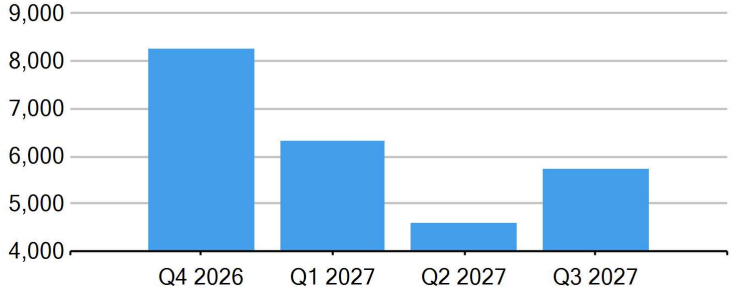
Effective Rent Gains	Oct-26	Change
Stanly County	$925	134.4%
Hickory/Newton/Lenoir	$1,425	2.9%
Salisbury	$1,273	1.9%
Rock Hill	$1,541	1.7%
Gastonia/Mt. Holly	$1,472	1.1%

New Units

Top 5 Submarkets with Most New Units in Pipeline



Leasing Starts Next 4 Quarters



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