

MARKET TRENDS

SACRAMENTO MULTIFAMILY



SIGNIFICANT SALE TRANSACTIONS 2Q 2025

Property	Submarket	Units	Sale Price	\$/Unit	Buyer	Seller
2150 Valley Oak Ln (2 Prop.)	Southport	400	\$94,000,000	\$235,000	Greystar Real Estate Partners	EQT Real Estate
5511 Harrison St (3 Prop.)	North Highlands	257	\$49,250,000	\$191,634	Lincoln Ave Communities	Rainbow Housing Ass. Corp Reliant Grp.
Villa Regia	North Highlands	90	\$15,600,000	\$173,333	Investment Magmt. Group, LLC	United Development Group
Coyle Creek Commons	Outer Carmichael	48	\$10,500,000	\$218,750	Enduravest Partners	Harry & Nancy Montfort

SIGNIFICANT UNDER CONSTRUCTION

Property	Address	Submarket	Units	Owner	Delivery Date
The Harper	6250 W Oaks Blvd	Outer Roseville/Rocklin	397	Advanced Building Solutions, Inc.	4Q26
Ona	3421 N Freeway Blvd	Natomas Crossing	303	Tricap Residential Group	3Q25
Gibson Drive Apartments	572 Gibson Dr	Harding	261	Shea Properties	1Q26
Pierside Apartments	997 Riverfront St	The Bridge District	260	Fulcrum Property	4Q26
Monarch	805 R St	Southside Park	241	Capitol Area Development Authority	2Q26

SIGNIFICANT COMPLETED CONSTRUCTION 2Q 2025

Property	Address	Submarket	Units	Owner	Delivery Date
The A.J.	251 6th St	Southern Pacific/Richards	345	USA Properties Fund, Inc.	April 2025
The Lyla	9124 Bruceville Rd	Outer Elk Grove	294	CONAM Management Corp.	April 2025
Bear Hollow Estates	10851 Bear Hollow Dr	Villages Of Zinfandel	149	Hawthorn Retirement Group	April 2025
Hope Landing	1413 Howe Ave	Outer Arden-Arcade	124	The John Stewart Company	June 2025
Zinc 1501	1501 Expo Pky	Johnson Business Park	121	A.G. Spanos Companies	May 2025

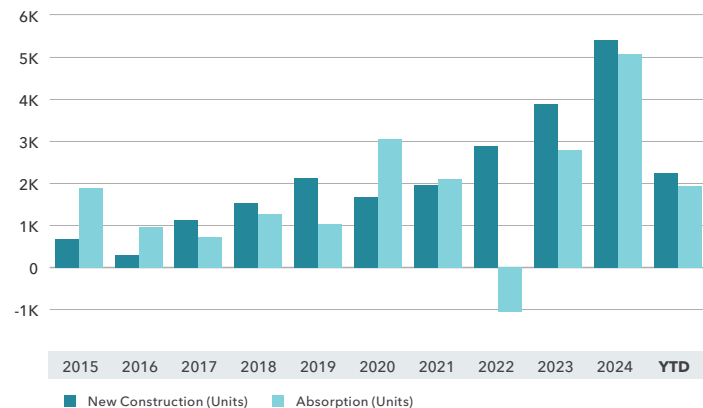
MARKET BREAKDOWN

	2Q25	1Q25	2Q24	YOY Change
Vacancy Rate	6.3%	6.3%	6.0%	30 bps
Average Asking Rents	\$1,777	\$1,771	\$1,763	1%
Under Construction	4,119	4,448	7,661	-46%
Average Sales Price/Unit	\$191,382	\$207,504	\$246,324	-22%
Average Cap Rate	5.7%	5.5%	5.2%	50 bps
	1Q25	2025 YTD	2024 YTD	YOY Change
Construction Deliveries	1,244	2,243	3,096	-28%
Net Absorption	1,130	1,943	2,405	-19%

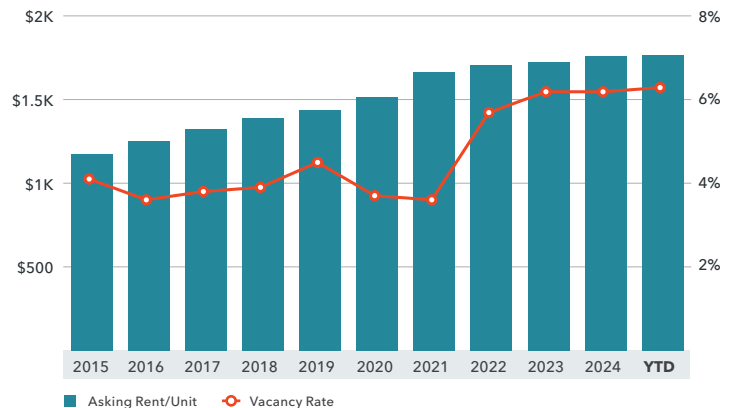
AVERAGE RENT

Unit Size	Monthly Rent
Studio	\$1,628
1 Bedroom	\$1,592
2 Bedroom	\$1,862
3 Bedroom	\$2,178

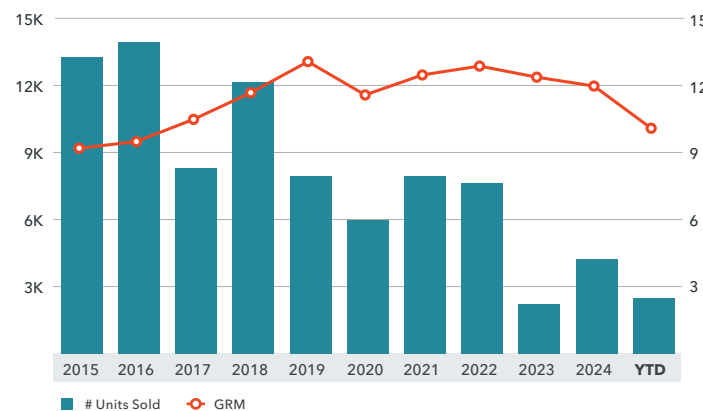
NEW CONSTRUCTION & ABSORPTION



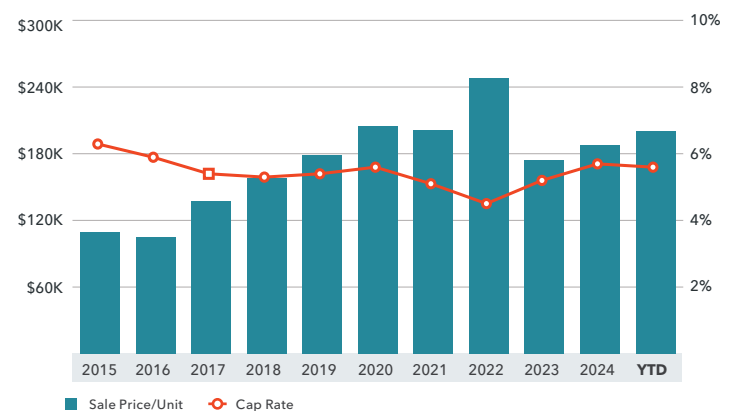
AVERAGE ASKING RENT/UNIT & VACANCY RATE



UNITS SOLD & GROSS RENT MULTIPLIER



AVERAGE SALE PRICE/UNIT & CAP RATES



Data Source: CoStar



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The information in this report was composed by the Kidder Mathews Research Group.

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COMMERCIAL BROKERAGE

\$9B

AVERAGE ANNUAL TRANSACTION VOLUME

26.2M

ANNUAL SALES SF

36.7M

ANNUAL LEASING SF

ASSET SERVICES

58M SF

MANAGEMENT PORTFOLIO SIZE

850+

ASSETS UNDER MANAGEMENT

250+

CLIENTS SERVED

VALUATION ADVISORY

2,400+

AVERAGE ASSIGNMENTS

39

TOTAL APPRAISERS

24

WITH MAI DESIGNATIONS

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