


# Real Estate Investor Insider

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## Large Investors Turn Net Sellers as Housing Market Rebalances

*As reported by [nationalmortgageprofessional.com](https://nationalmortgageprofessional.com)*

Institutional investors remain a significant force in U.S. housing, but their role is shifting. According to BatchData's Q4 2025 Investor Pulse Report, investors accounted for 32% of all home purchases in the fourth quarter, down slightly from the previous quarter and continuing a gradual slowdown in acquisition activity.



Behind that share, however, the trend is changing direction. Large-scale investors are selling more homes than they are buying.

Firms with portfolios of 1,000 or more properties sold 5,970 homes in Q4 while acquiring 4,336, marking the eighth consecutive quarter of net selling. Over the full year, these investors offloaded 20% more homes than they purchased.

This shift comes as overall investor activity declines. Total acquisitions fell to 1.32 million homes in 2025, down from 1.39 million the year prior. In Q4 alone, investor purchases dropped both quarter-over-quarter and year-over-year, reflecting a more cautious approach in a higher-rate environment.

"While investors continue to represent a high percentage of home purchases, the number of properties they're buying has actually decreased significantly," said Ivo Draginov.

Despite headlines around institutional ownership, smaller investors still dominate the landscape, holding the vast majority of investor-owned homes. Meanwhile, the gradual unwinding of large portfolios could introduce additional inventory into the market, with potential implications for pricing dynamics and overall housing supply.