

Opinion Newsletter | John Authers, Columnist

K Now Means Kicking Private Equity Out of the House

There's opportunity in inequality. There's also an election coming up.

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By John Authers

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President Donald Trump made clear the importance of the issue with Wednesday's dramatic post on Truth Social that he intended to bar investment groups from owning single-family homes:

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Private equity tends to buy in bulk, preferring to stack up on newly built inventory directly from homebuilders. Their stocks also reacted very badly. After surging throughout 2023 and 2024, the sector has given up its gains and now stands at its lowest compared to the broader market in three years:

Homebuilding Stocks Take a Beating

Builders are their lowest relative to the market in three years

✓ S&P 1500 Homebuilders Relative to S&P 1500