

Property Market Indicator Summary

All data to week ending 14 December 2025

Both clearance rates and the volume of auctions are winding down for 2025.

The number of auctions held last week fell by 8.1% relative to the week prior, with 2,932 homes taken under the hammer across the combined capitals. Auction activity is expected to fall further this week, with the volume of scheduled auctions falling to around 1,330, before reducing to virtually nothing until market activity starts picking back up in mid-January.

The preliminary clearance rate fell to 62.7% last week, 80 basis points below the week prior (63.5% which revised down to 57.7% once finalised) and marked the lowest preliminary clearance rate since the week ending December 8th, 2024.

While the reduction in volume is following the typical seasonal pattern, the gradual easing in auction clearance rates, which has been evident since mid-September, has more to do with market conditions. Cotality's high frequency daily Home Value Index (HVI) is showing a clear slowdown in the pace of growth through December, especially in the major auction markets of Sydney and Melbourne. Over the past four weeks, Cotality's daily HVI for Sydney has levelled out to a 0.0% change, while the four-week rate of growth in Melbourne values has eased back to 0.1%.

Melbourne led the volume of auctions last week with 1,474 homes going under the hammer, down 8.8% on the previous week's volume. The preliminary clearance rate held reasonably steady at 65.7%, 20 basis points higher than the week prior (65.5%).

966 homes were taken to auction in Sydney last week, down 11.3% from the week prior. The preliminary clearance rate fell to the city's lowest since the week ending December 8th, with 58.1% of auction collected so far reporting a successful result, 3.4 percentage points lower than the preliminary rate recorded (61.5%) a week ago.

Brisbane hosted 184 auctions last week, two more than the week prior, with 60.3% of results reported so far returning a positive result, a 5.6 percentage point rise on the previous week.

Adelaide saw 153 homes go to auction over the week, a 5.0% reduction on the previous week. The preliminary clearance rate fell by 1.2 percentage points to 69.7%

Canberra recorded 137 auctions last week, a solid 24.5% jump on the volume the week prior. The preliminary clearance rates also ticked higher, up 3.9 percentage points from the previous week to 59.6%.

Perth hosted 18 auctions, with 46.2% of the results collected so far returning a positive result, while no auctions were held in Tasmania last week.

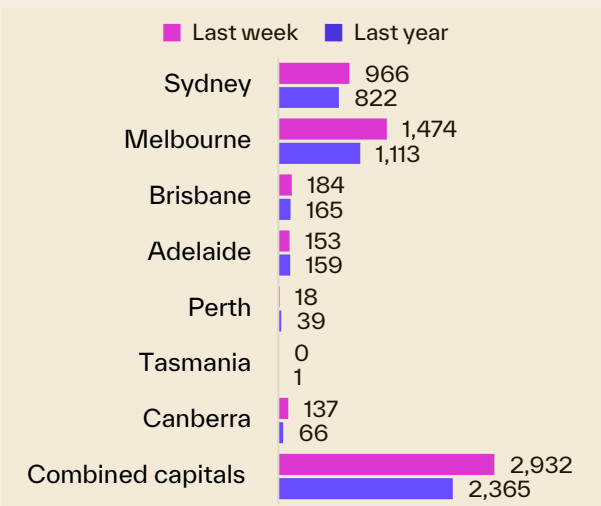
Please note, this is the final Property market indicator summary for 2025. Cotality's Property market indicator summary will return on Monday January 12th, 2026, with auction reporting re-commencing in late January or early February depending on volumes.

Capital City Auction Statistics (Preliminary)

Clearance rate



Total auctions



Media enquiries: media@cotality.com

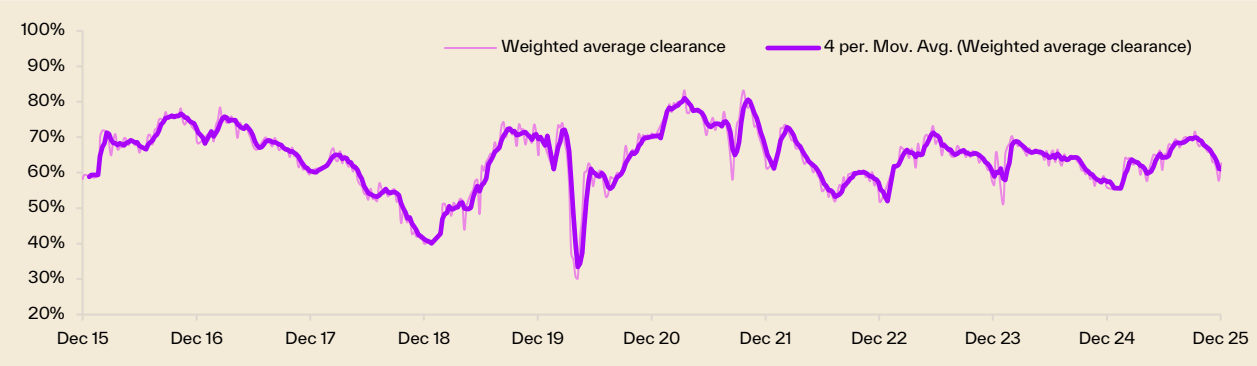
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Capital City Auction Statistics (Preliminary)

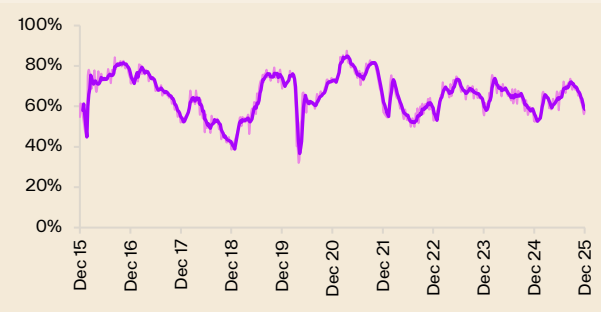
City	Clearance rate	Total auctions	Cotality auction results	Cleared auctions	Uncleared auctions
Sydney	58.1%	966	743	432	311
Melbourne	65.7%	1,474	1,095	719	376
Brisbane	60.3%	184	131	79	52
Adelaide	69.7%	153	109	76	33
Perth	46.2%	18	13	6	7
Tasmania	n.a.	0	0	0	0
Canberra	59.6%	137	109	65	44
Combined capitals	62.7%	2,932	2,200	1,378	822

Weekly clearance rates

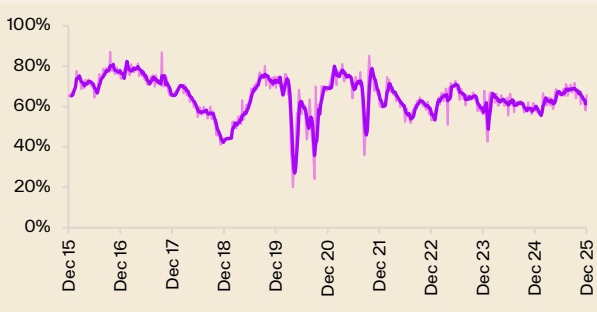
Combined capital cities



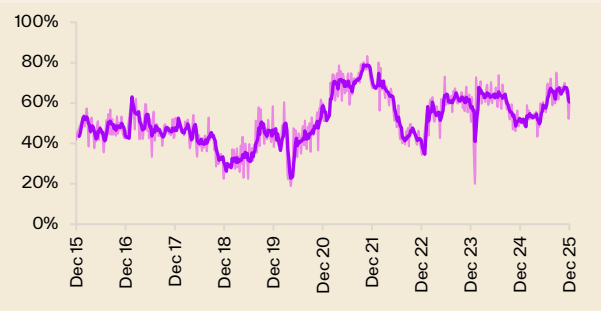
Sydney



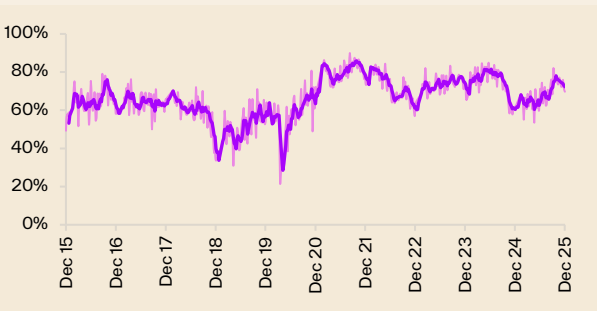
Melbourne



Brisbane



Adelaide



Property Market Indicator Summary

Sub-region auction statistics (Preliminary)

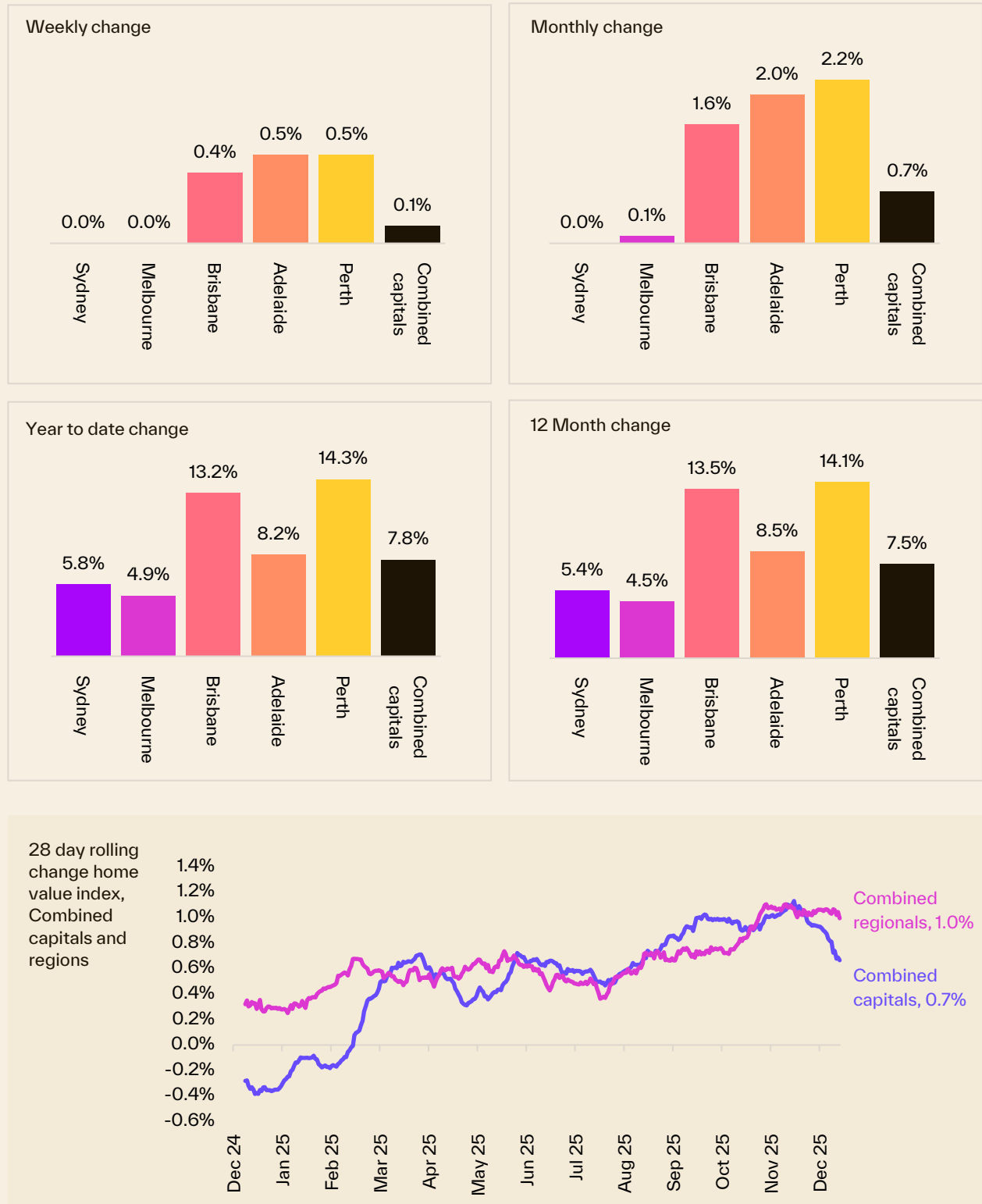
Region	Clearance rate	Total auctions	Collected results	Cleared auctions	Uncleared auctions
Sydney sub-regions					
Central Coast	54.2%	33	24	13	11
Baulkham Hills and Hawkesbury	61.9%	43	21	13	8
Blacktown	69.7%	61	33	23	10
City and Inner South	50.7%	81	73	37	36
Eastern Suburbs	63.9%	74	72	46	26
Inner South West	69.0%	122	100	69	31
Inner West	56.3%	68	48	27	21
North Sydney and Hornsby	48.4%	120	95	46	49
Northern Beaches	44.7%	113	103	46	57
Outer South West	n.a.	7	6	5	1
Outer West and Blue Mountains	73.3%	16	15	11	4
Parramatta	59.3%	76	59	35	24
Ryde	53.9%	42	26	14	12
South West	68.4%	66	38	26	12
Sutherland	70.0%	44	30	21	9
Melbourne sub-regions					
Inner	66.1%	253	183	121	62
Inner East	51.4%	155	105	54	51
Inner South	70.0%	170	120	84	36
North East	69.2%	219	169	117	52
North West	69.1%	158	126	87	39
Outer East	70.2%	107	84	59	25
South East	67.7%	179	124	84	40
West	61.4%	195	153	94	59
Mornington Peninsula	61.3%	38	31	19	12
Regional SA4					
Newcastle and Lake Macquarie	75.9%	35	29	22	7
Illawarra	59.3%	33	27	16	11
Gold Coast	48.0%	64	50	24	26
Sunshine Coast	41.1%	64	56	23	33
Geelong	64.3%	24	14	9	5

The above results are preliminary, with ‘final’ auction clearance rates published each Thursday. Cotality, on average, collects 99% of auction results each week. Clearance rates are calculated across properties that have been taken to auction over the past week.

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Property Market Indicator Summary

Capital city home value changes

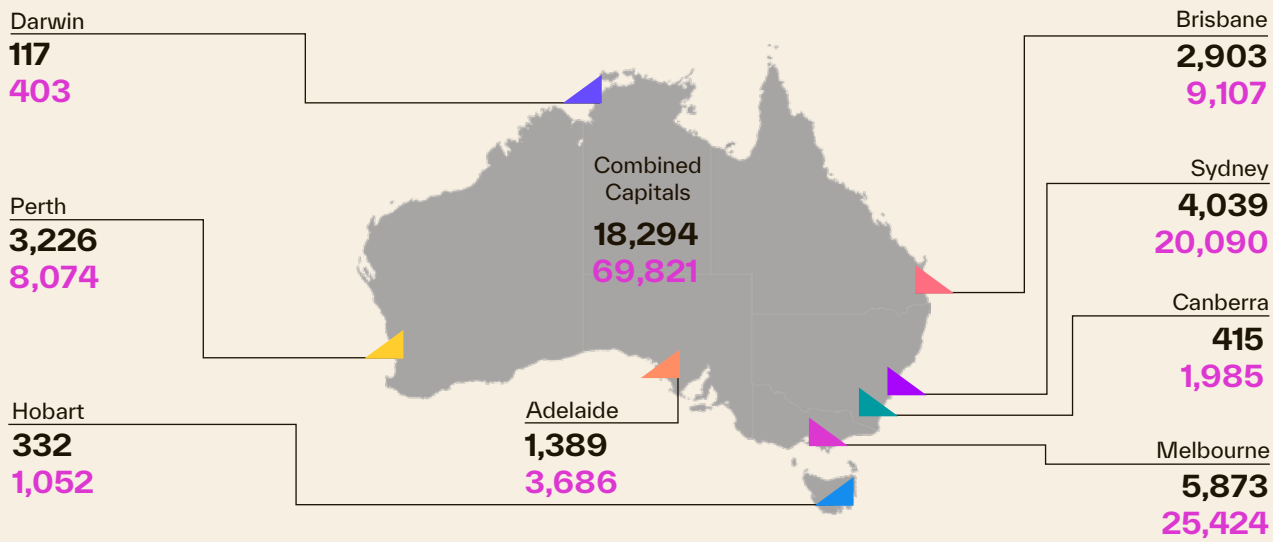


Results are based on the Cotality Daily Home Value Index. Further information and daily updates on the index results are available from <https://www.cotality.com/au/our-data/indices>.

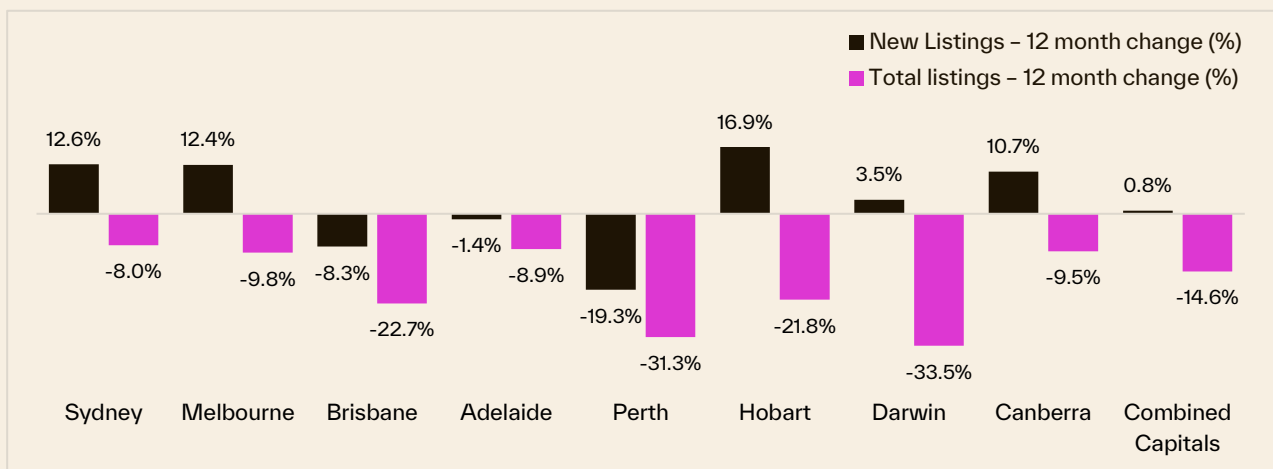
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Property Market Indicator Summary

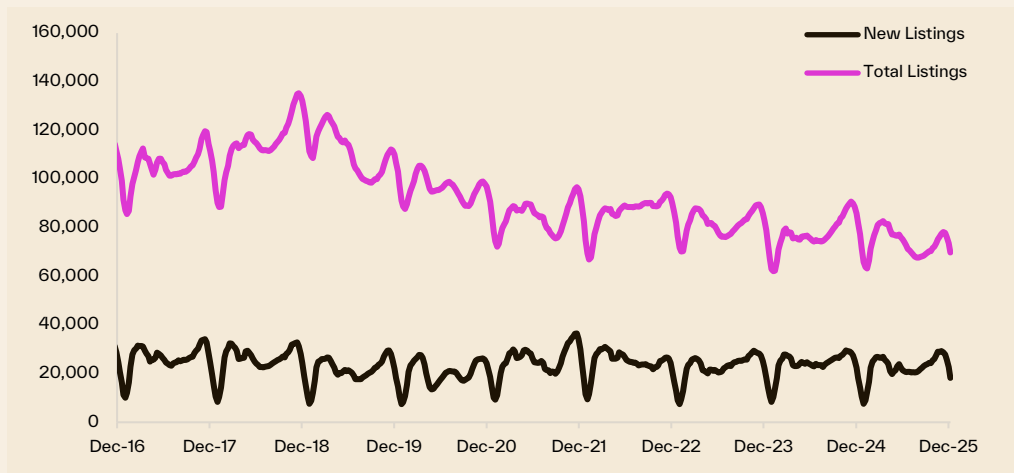
Capital city properties listed for sale – four week count



Listings – 12 month change (%)



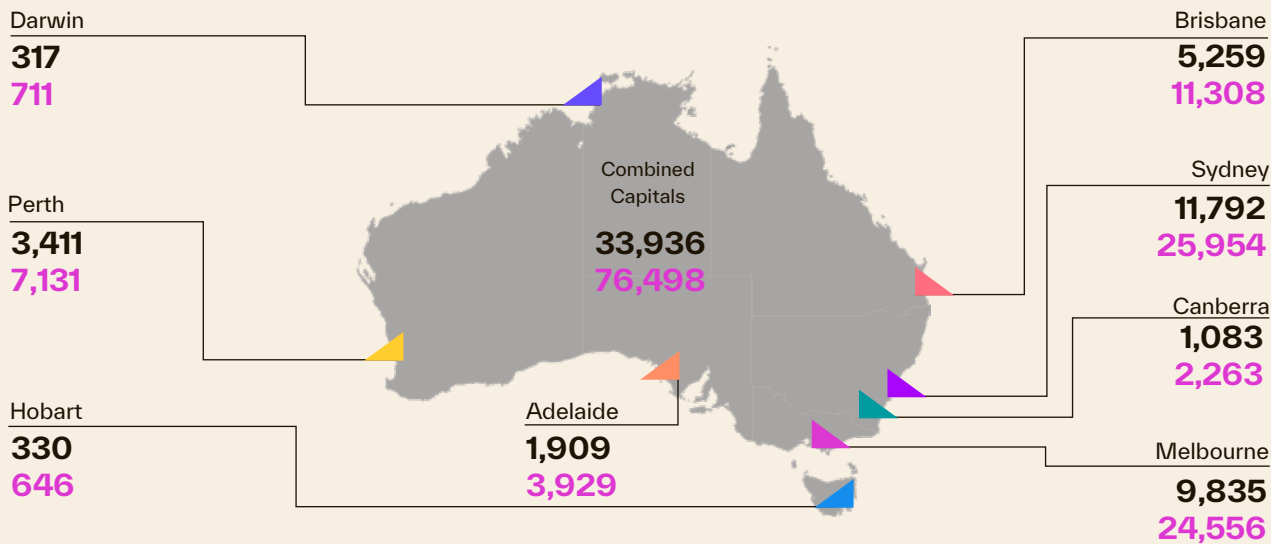
Number of homes for sale, combined capital cities



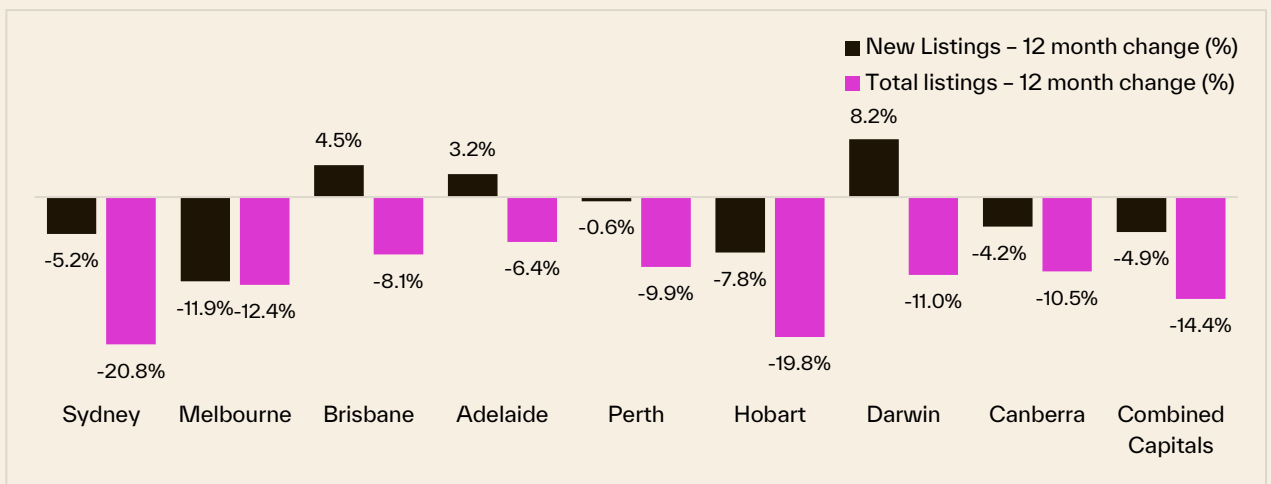
These results are calculated across properties that have been advertised for sale over the 28 days ending 14 December 2025. A new listing is one which has not been previously advertised for sale within 75 days, total listings include new listings and properties which have been previously advertised.

Property Market Indicator Summary

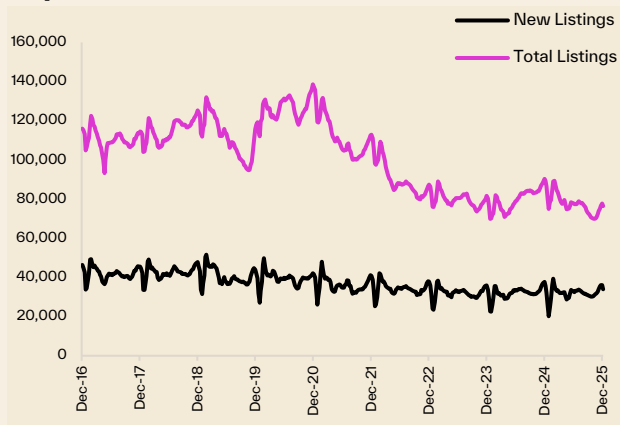
Capital city properties listed for rent – four week count



Rental listings – 12 month change (%)



Number of homes for rent, combined capital cities



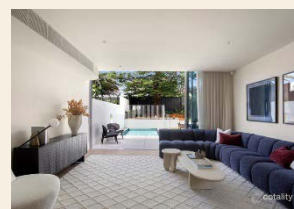
Rental snapshot – data to November 2025

		Change in rents (all dwellings)			Gross yields (all dwellings)		Vacancy rates (all dwellings)	
		Month	Quarter	Annual	Current	12 months ago	Current	12 months ago
Region	Median rent							
Sydney	\$816	0.6%	1.6%	4.7%	3.0%	3.0%	1.6%	2.3%
Melbourne	\$620	0.3%	0.7%	2.3%	3.6%	3.6%	1.4%	1.7%
Brisbane	\$703	0.4%	1.1%	6.2%	3.4%	3.6%	1.8%	2.1%
Adelaide	\$633	0.3%	0.4%	3.5%	3.5%	3.7%	0.9%	1.1%
Perth	\$739	0.5%	1.5%	5.9%	3.9%	4.2%	1.1%	1.3%
Hobart	\$595	0.8%	1.9%	6.8%	4.3%	4.2%	1.2%	2.1%
Darwin	\$692	0.3%	2.3%	8.6%	6.3%	6.8%	2.2%	2.8%
Canberra	\$680	0.3%	0.4%	3.2%	4.0%	4.0%	1.6%	2.2%
Combined capitals	\$709	0.5%	1.2%	4.5%	3.4%	3.5%	1.5%	1.9%
Combined regionals	\$597	0.6%	1.5%	6.2%	4.3%	4.4%	1.4%	1.9%
National	\$679	0.5%	1.3%	5.0%	3.6%	3.7%	1.5%	1.9%




Property Market Indicator Summary

Top two sales over the past week, states and territories

New South Wales




4B Wallangra Road
Dover Heights,



 4  3  3

\$7,200,000

Ray White Double Bay



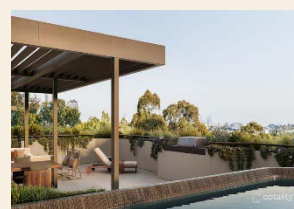
4 Nanette Place
Castle Hill,

 8  4  3




\$5,450,000

McGrath

Victoria




302/2 Bruce Street
Toorak,




 4  4  6

\$20,950,000

Christies International Real Estate




34 Robe Street
St Kilda,

 3  2  2




\$3,600,000

Whitefox Real Estate

Queensland




2 Saywell Street
Sorrento,




 5  5  3

\$7,700,000

Kollosche




38 Clearwater Court
Wongawallan,

 6  3  5




\$3,500,000

Harcourts Property Hub

South Australia




2B Parry Avenue
Somerton Park,




 4  2  2

\$1,695,000

Harris Real Estate Blackwood




8 Warunda Avenue
Seaview Downs,

 4  2  2




\$1,652,500

First National Lewis Prior

Western Australia




72 Glyde Street
Mosman Park,




 4  2  2

\$2,800,000

Ray White Dalkeith | Claremont



55 Solomon Street
Mosman Park,

 3  2  2

\$2,350,000

Wallace Realty


Property Market Indicator Summary

Top two sales over the past week, states and territories

Tasmania



23 Colville Street
Battery Point,

 3  2  0

\$2,800,000

New Haus Agency



15 Aqua Place
Seven Mile Beach,

 4  2  2

\$1,700,000

Harcourts Signature - Rosny Park

Northern Territory



12 Brumby Court
Marlow Lagoon,


 4  2  2

\$1,040,000

Real Estate Central




14 Mcarthur Court
Leanyer,

 4  2  0




\$875,000

Smart Real Estate

Australian Capital Territory




98 Hopetoun Circuit
Yarralumla,




 4  1  2

\$1,860,000

Fuse Property



48 Dumas Street
Mckellar,

 5  4  3

\$1,655,000

LJ Hooker Canberra City

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