Property Market Indicator Summary

All data to week ending 19 October 2025

Selling season heats up across combined capitals

The preliminary auction clearance rate reached a four-week high, rising to 73.8% last week, up from 73.0% the previous week (revised down to 68.2% on final numbers) and a recent low of 71.4% through the last week of September.

From a volume perspective, the selling season is heating up, with 2,662 homes taken to auction last week, the highest weekly number of auctions since the week ending June 1st, 2025 (2,918).

Auction activity is set to rise further, with more than 3,200 homes scheduled to go under the hammer this week before dropping back to around 2,180 next week as Melbourne pauses for the Spring Racing Carnival.

Across the capital cities, Melbourne hosted the most auctions, with 1,168 homes taken to market, down 6.5% from the previous week when 1,249 homes were auctioned. The preliminary clearance rate came in at 74.4%, the highest result in four weeks but still well below the spring high of 78.6% recorded over the week ending September 21st.

1,082 auctions were held in Sydney last week, a 9.5% rise on the previous week (988). This is not only the second highest volume through spring so far, but also just the fourth time this year where Sydney has hosted more than 1,000 auctions. The preliminary clearance rate held up well under the higher volume, coming in at 74.5% last week, a four-week high.

Brisbane led the smaller capitals for the number of auctions held, with 198 homes going under the hammer last week, the third highest volume of auctions held so far this year. The preliminary clearance rate of 70.7% was the highest in five weeks.

104 homes were auctioned in the ACT last week, down 1.9% from the week prior. 66.2% have been reported as successful so far, up from 61.5% the week prior but well down on the spring high of 81.3% recorded over the week ending September 21st.

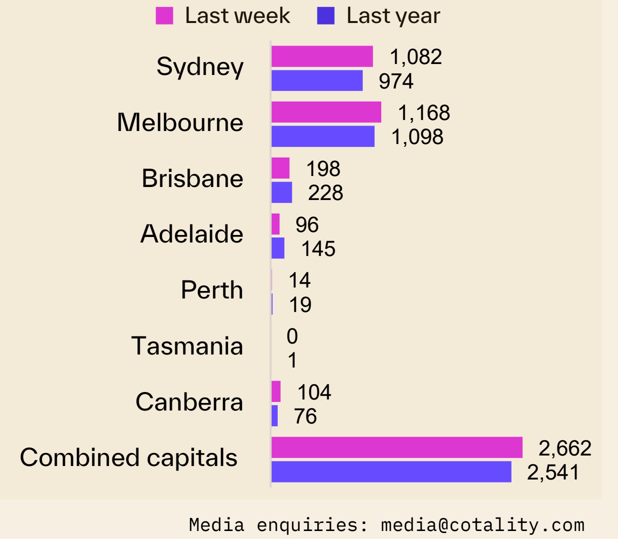
96 homes went to auction across Adelaide last week, level with the previous week. 77.4% of auctions have reported a positive result so far.

Only 14 auctions were held across Perth last week, while there were no auctions in Tasmania.

Capital City Auction Statistics (Preliminary)

Clearance rate

Total auctions



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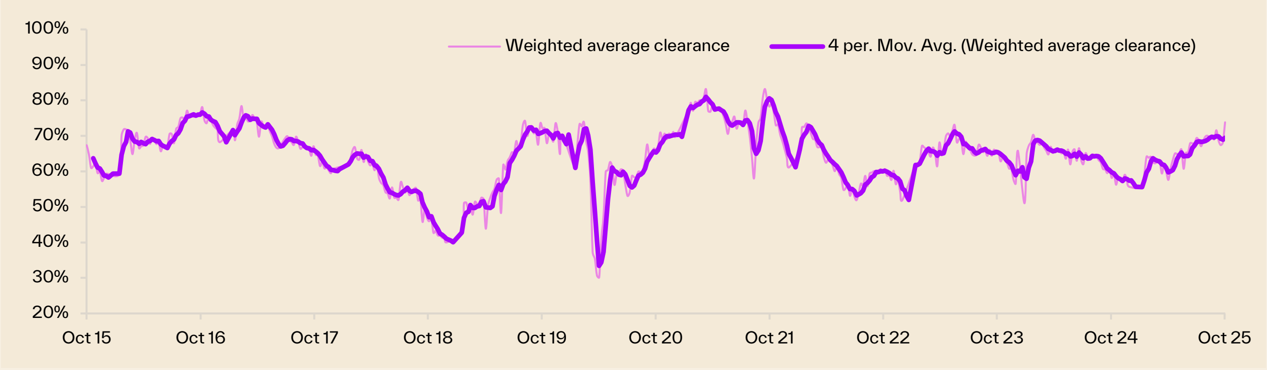
Property Market Indicator Summary

Capital City Auction Statistics (Preliminary)

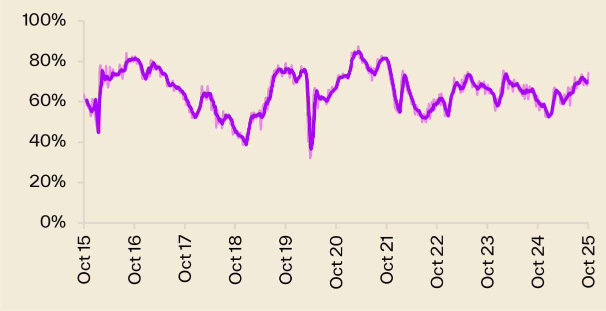
City	Clearance rate	Total auctions	Cotality auction results	Cleared auctions	Uncleared auctions
Sydney	74.5%	1,082	807	601	206
Melbourne	74.4%	1,168	773	575	198
Brisbane	70.7%	198	147	104	43
Adelaide	77.4%	96	53	41	12
Perth	54.5%	14	11	6	5
Tasmania	n.a.	0	0	0	0
Canberra	66.2%	104	74	49	25
Combined capitals	**73.8%**	**2,662**	**1,865**	**1,377**	**488**

Weekly clearance rates

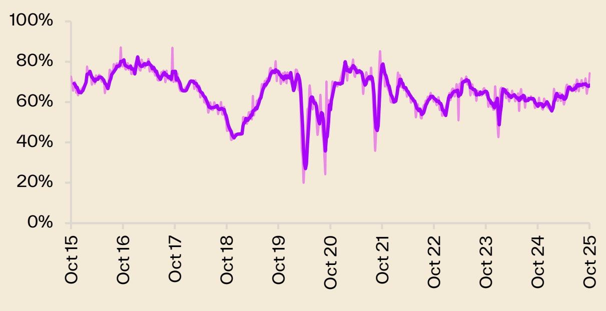
Combined capital cities



Sydney

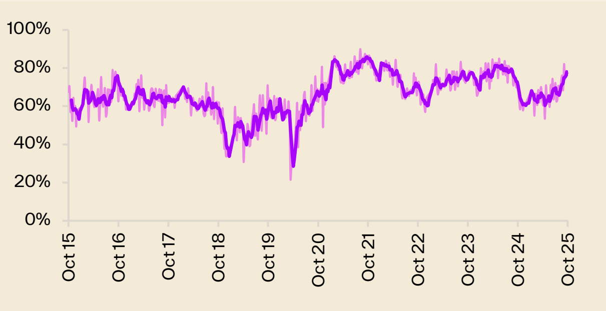


Melbourne



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	91.7%	24	12	11	1
Baulkham Hills and Hawkesbury	72.7%	50	33	24	9
Blacktown	73.5%	75	34	25	9
City and Inner South	72.8%	97	81	59	22
Eastern Suburbs	77.1%	101	96	74	22
Inner South West	87.1%	129	101	88	13
Inner West	74.0%	105	77	57	20
North Sydney and Hornsby	66.3%	131	92	61	31
Northern Beaches	70.8%	85	72	51	21
Outer South West	n.a.	9	7	5	2
Outer West and Blue Mountains	27.3%	12	11	3	8
Parramatta	78.6%	78	56	44	12
Ryde	69.1%	70	55	38	17
South West	71.7%	71	46	33	13
Sutherland	82.4%	45	34	28	6
Melbourne sub-regions					
Inner	75.5%	194	110	83	27
Inner East	75.8%	179	124	94	30
Inner South	75.0%	136	80	60	20
North East	75.7%	152	107	81	26
North West	77.2%	125	101	78	23
Outer East	81.4%	78	59	48	11
South East	72.5%	136	80	58	22
West	63.1%	153	103	65	38
Mornington Peninsula	90.0%	16	10	9	1
Regional SA4					
Newcastle and Lake Macquarie	76.7%	33	30	23	7
Illawarra	52.4%	24	21	11	10
Gold Coast	55.4%	76	56	31	25
Sunshine Coast	67.9%	39	28	19	9
Geelong	91.7%	15	12	11	1

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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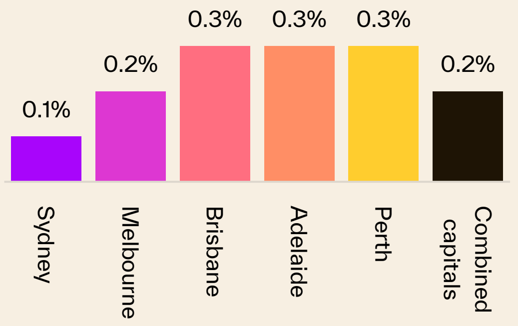
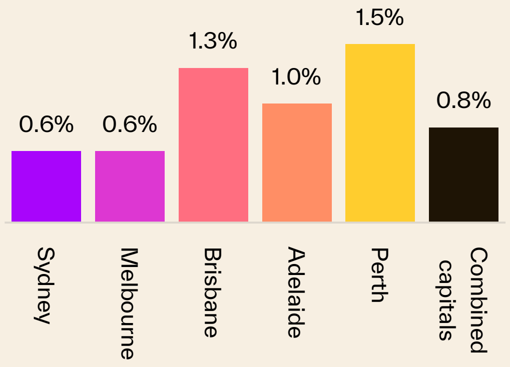
Property Market Indicator Summary

Capital city home value changes

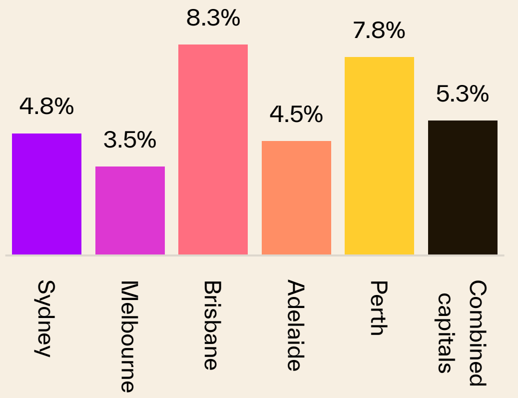
Weekly change



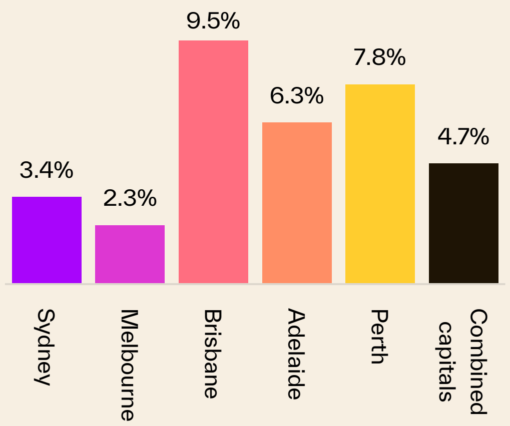
Monthly change



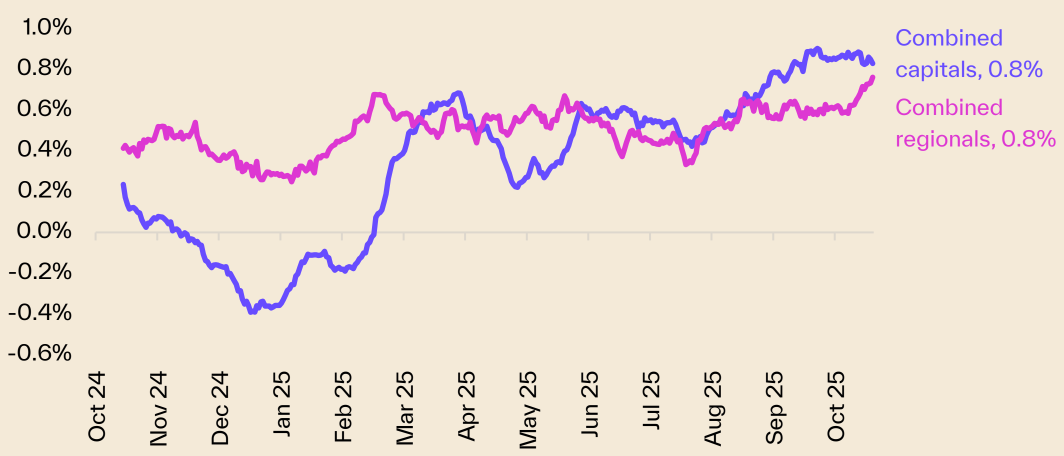
Year to date change



12 Month change



28 day rolling change home value index, Combined capitals and regions



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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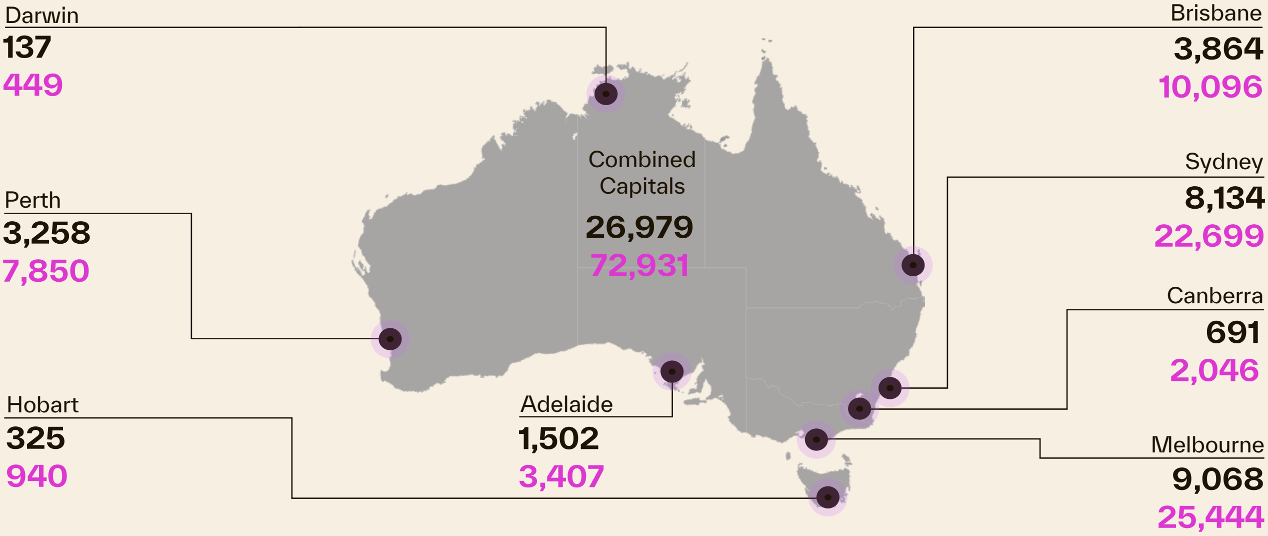
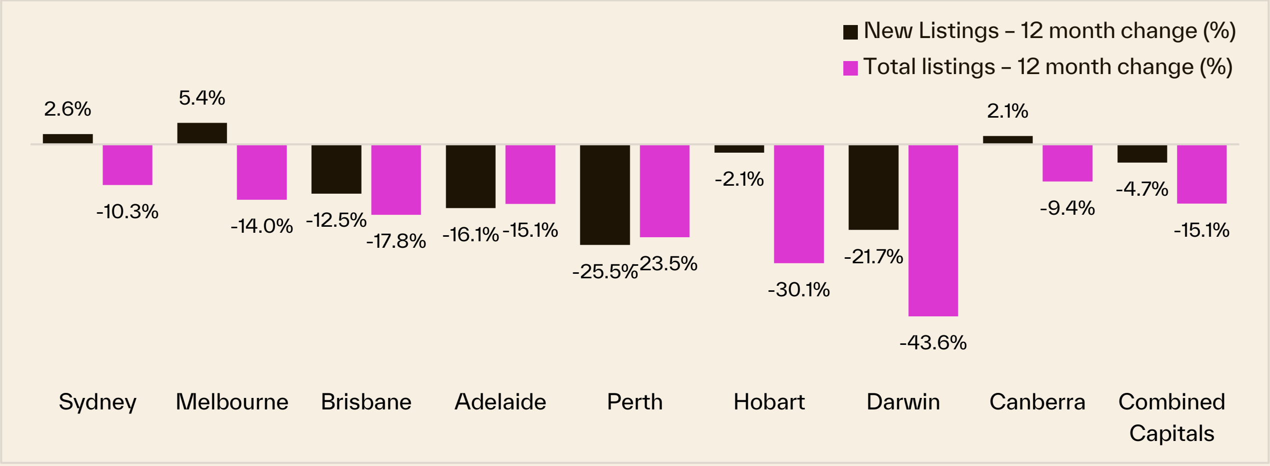
Property Market Indicator Summary

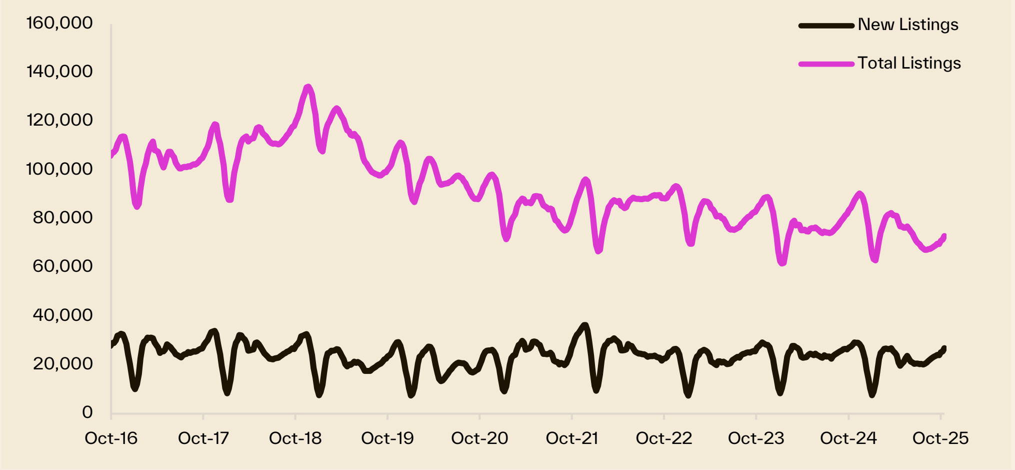
Capital city properties listed for sale — four week count



Listings — 12 month change (%)



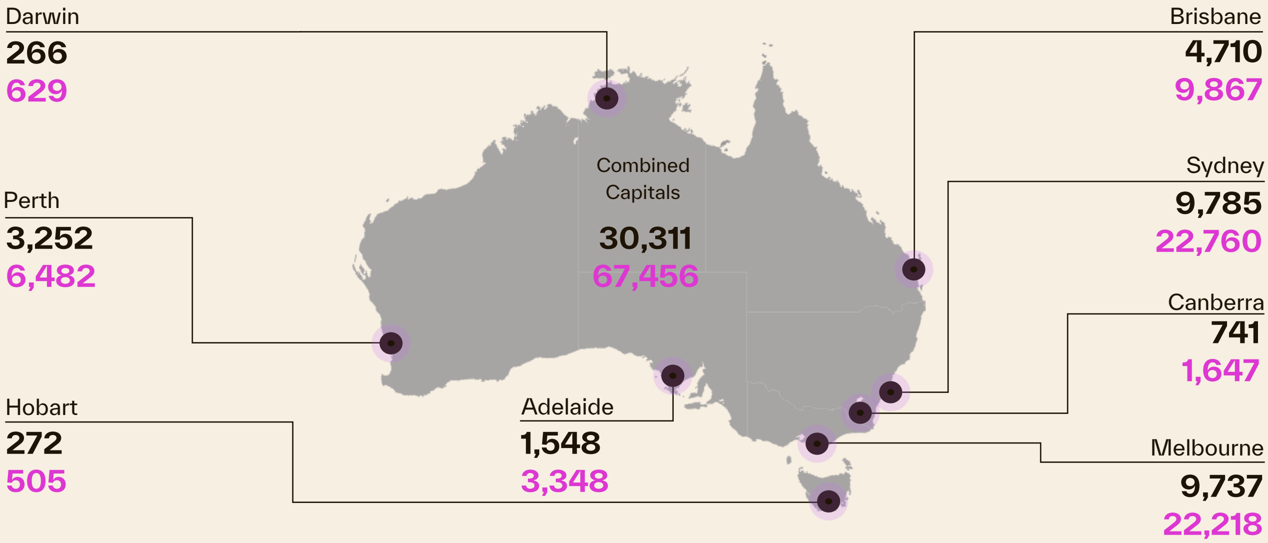
Number of homes for sale, combined capital cities



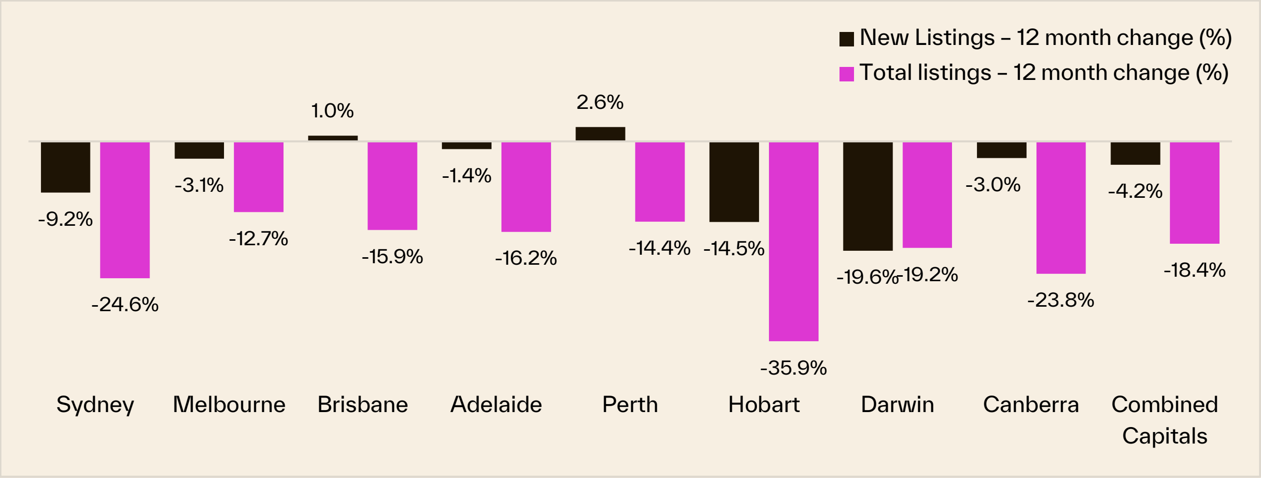
These results are calculated across properties that have been advertised for sale over the 28 days ending 19 October 2025. A new listing is one which has not been previously advertised for sale within 75 days, total listings include new

Property Market Indicator Summary

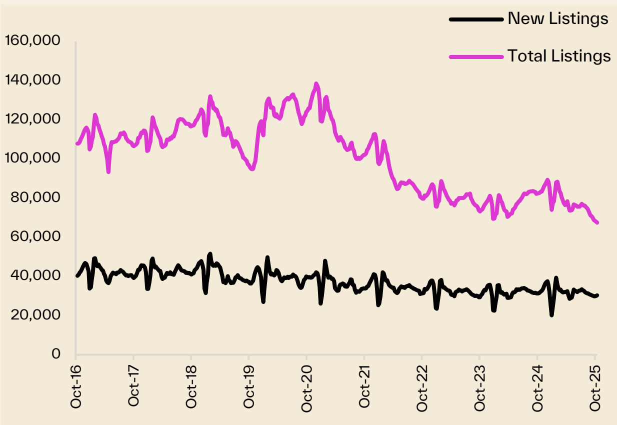
Capital city properties listed for rent — four week count



Rental listings — 12 month change (%)



Number of homes for rent, combined capital cities



Rental snapshot — data to September 2025

		Change in rents (all dwellings)			Gross yields (all dwellings)		Vacancy rates (all dwellings)	
Region	**Median rent**	**Month**	**Quarter**	**Annual**	**Current**	**12 months ago**	**Current**	**12 months ago**
Sydney	$807	0.3%	0.8%	3.5%	3.0%	3.0%	1.6%	2.3%
Melbourne	$615	0.1%	0.4%	1.4%	3.7%	3.6%	1.4%	1.7%
Brisbane	$696	0.3%	1.2%	5.6%	3.6%	3.7%	1.7%	2.1%
Adelaide	$633	-0.1%	0.0%	3.9%	3.6%	3.7%	0.9%	1.2%
Perth	$729	0.4%	0.9%	5.6%	4.2%	4.2%	1.1%	1.4%
Hobart	$584	0.4%	0.8%	6.2%	4.4%	4.3%	1.2%	2.4%
Darwin	$687	1.7%	4.2%	7.6%	6.5%	6.8%	2.1%	2.1%
Canberra	$680	0.0%	0.3%	2.8%	4.0%	4.0%	1.6%	2.4%
Combined capitals	$702	0.3%	0.8%	3.7%	3.4%	3.4%	1.5%	1.9%
Combined regionals	$591	0.4%	1.1%	5.9%	4.4%	4.4%	1.4%	2.0%
National	**$672**	**0.3%**	**0.8%**	**4.3%**	**3.7%**	**3.6%**	**1.5%**	**1.9%**

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Property Market Indicator Summary

Top two sales over the past week, states and territories

New South Wales

132 Hopetoun Avenue
Vaucluse

5 3 2

$9,600,000

Ray White Double Bay

4 Alkira Place
Caringbah South

5 6 2

$7,600,000

Pulse Property Agents

Victoria

12 Monica Street
Essendon

4 3 4

$4,280,000

McDonald Upton

7 Esplanade
Williamstown

4 2 3

$4,050,000

Compton Green

Queensland

27 Seamount Quay
Noosa Waters

5 4 2

$7,250,000

McLure Prestige

6 Herbert Street
New Farm

5 2 3

$5,625,000

Ray White New Farm

South Australia

7 Eton Road
Somerton Park

4 2 0

$2,850,000

Harris Real Estate Blackwood

15 Kennaway Street
Tusmore

3 2 1

$2,422,000

Bespoke Agents

Western Australia

10 Raleigh Road
Sorrento

3 1 2

$2,175,000

C Realty Perth

9 Ashley Avenue
Quinns Rocks

6 3 4

$2,100,000

Shyft Realty

Property Market Indicator Summary

Top two sales over the past week, states and territories

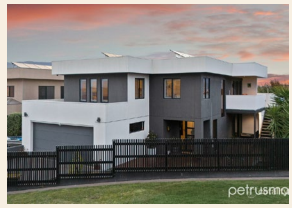
Tasmania

15 Enterprise Road
Sandy Bay

6 3 0

$1,650,000

Petrusma Property Hobart/ Sandy Bay



5 Trikala Place
Tranmere

5 3 2

$1,500,000

Petrusma Property Hobart/ Sandy Bay

Northern Territory

21 Coleman Street
Muirhead

4 2 2

$982,500

For Sale By Owner Australia

25 Humbert Street
Leanyer

4 2 5

$920,000

Billy Nida Realty

Australian Capital Territory

2 Greenhood Place
O'Connor

4 2 4

$1,875,000

Ray White Canberra

2 Hyde Place
Hughes

4 3 0

$1,710,000

Luton Properties Manuka

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