

Property Market Indicator Summary

All data to week ending 5 October 2025

Preliminary clearance rate nudged higher despite long weekend disruptions

The volume of auctions bounced 13% higher relative to the previous week, with 1,961 homes going under the hammer last week. However, the number of auctions held was mixed, with Melbourne seeing more than a 400% increase in auction activity last week following a long weekend the week prior, while Sydney saw a 56% slump in auctions, attributable to the long weekend and NRL Grand Final.

The next two weeks are set to see auction activity building momentum, with approximately 2,600 capital city homes scheduled for auction this week, rising to around 2,670 next week.

Despite the disruption of a long weekend in most states, the preliminary combined capitals clearance rate edged higher last week, rising to 71.9% from 71.4% the week prior (revised lower to 68.7% on final results).

Melbourne was the main driver of the higher preliminary clearance rate last week. At 71.6%, the early clearance rate was a 7.0 percentage point increase from the week prior. The number of auctions held jumped 422%, reaching 1,169 last week, after the AFL Grand Final long weekend disrupted activity the previous week.

The number of Sydney auctions held dropped by 56% last week amid the long weekend and NRL Grand Final. 72.4% of auctions have returned a positive result so far, down from 73.5% the previous week (revised lower to 70.2% once finalised).

Across the smaller capitals, Brisbane hosted the most auctions last week, with 147 homes going under the hammer and a preliminary clearance rate of 69.3%, the highest in three weeks.

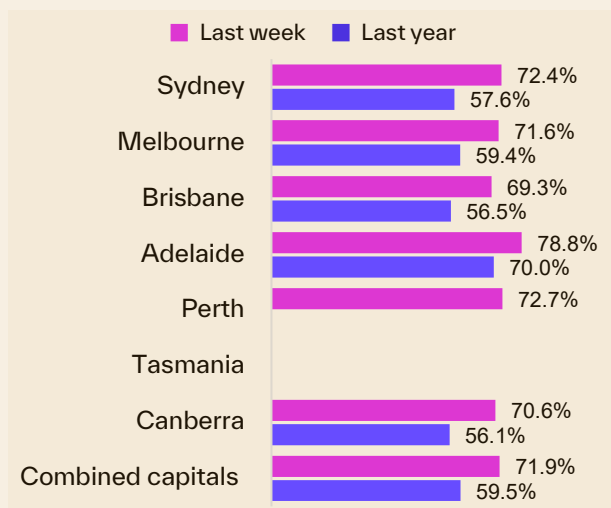
There were 67 auctions held in Adelaide last week, down 14% from the week prior. 78.8% of auctions have reported a successful result so far.

Across the ACT, 56 homes went to auction last week, less than half the volume seen the week prior (116), returning an early clearance rate of 70.6%.

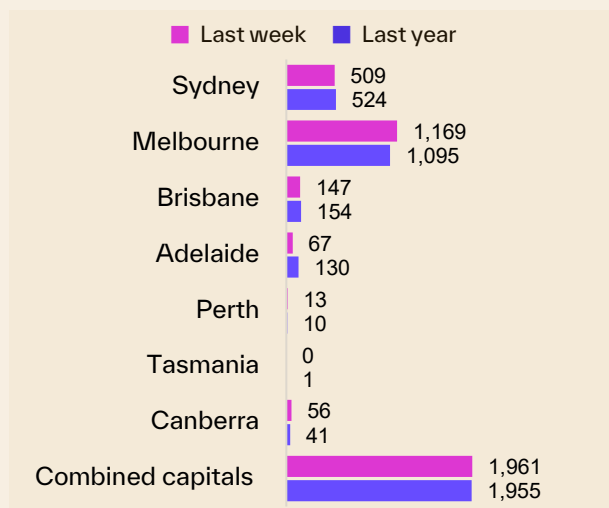
There were 13 auctions held in Perth last week, eight of which reported a successful result so far, while there were no auctions in Tasmania.

Capital City Auction Statistics (Preliminary)

Clearance rate



Total auctions



Media enquiries: media@cotality.com

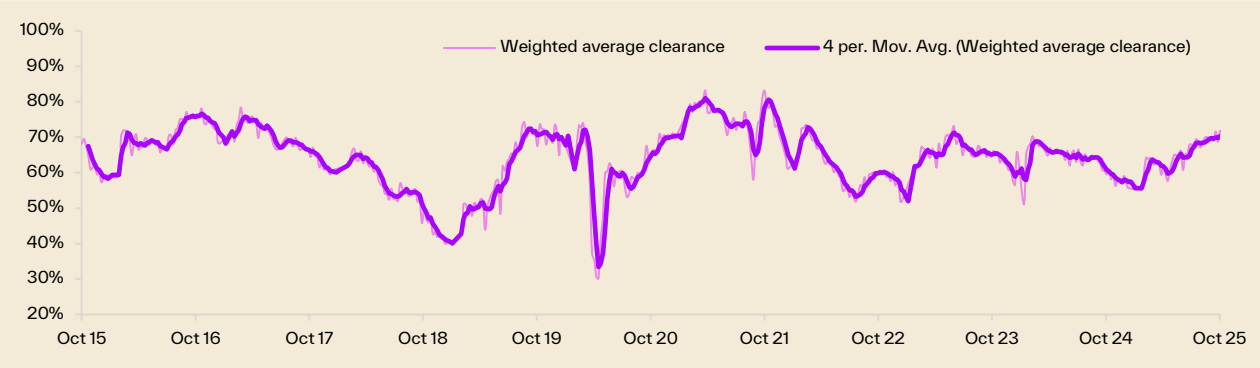
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Capital City Auction Statistics (Preliminary)

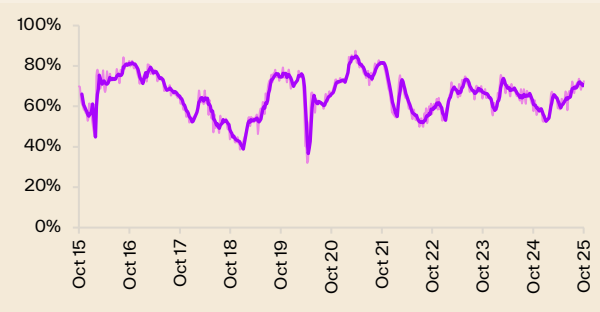
City	Clearance rate	Total auctions	Cotality auction results	Cleared auctions	Uncleared auctions
Sydney	72.4%	509	421	305	116
Melbourne	71.6%	1,169	922	660	262
Brisbane	69.3%	147	114	79	35
Adelaide	78.8%	67	52	41	11
Perth	72.7%	13	11	8	3
Tasmania	n.a.	0	0	0	0
Canberra	70.6%	56	51	36	15
Combined capitals	71.9%	1,961	1,571	1,129	442

Weekly clearance rates

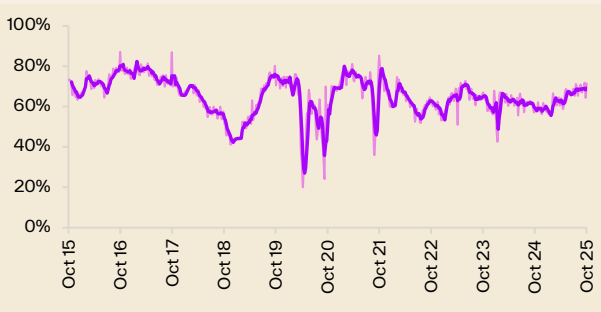
Combined capital cities



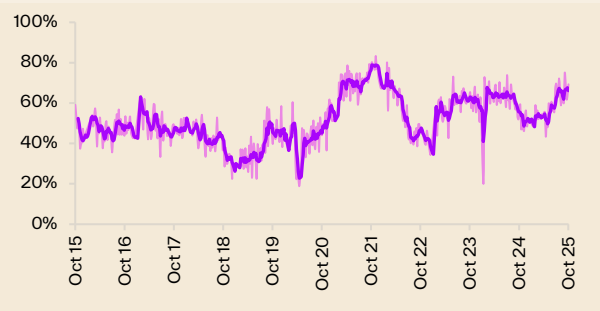
Sydney



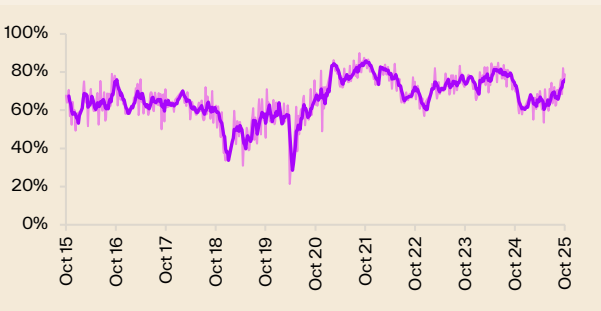
Melbourne



Brisbane



Adelaide



Property Market Indicator Summary

Sub-region auction statistics (Preliminary)

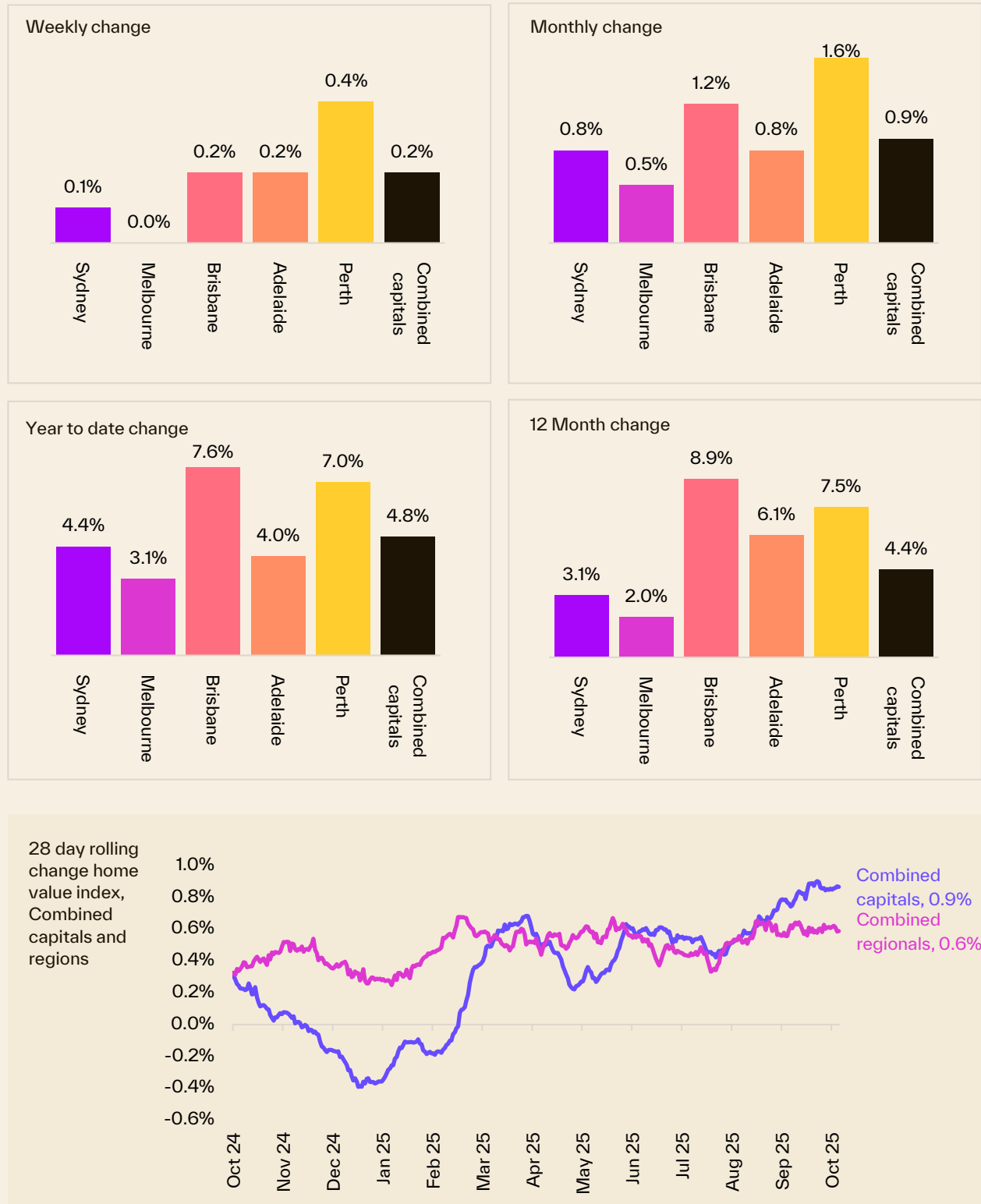
Region	Clearance rate	Total auctions	Collected results	Cleared auctions	Uncleared auctions
Sydney sub-regions					
Central Coast	88.2%	21	17	15	2
Baulkham Hills and Hawkesbury	68.4%	27	19	13	6
Blacktown	69.2%	27	13	9	4
City and Inner South	60.7%	56	56	34	22
Eastern Suburbs	70.6%	53	51	36	15
Inner South West	77.1%	56	48	37	11
Inner West	77.1%	41	35	27	8
North Sydney and Hornsby	70.9%	69	55	39	16
Northern Beaches	78.6%	45	42	33	9
Outer South West	n.a.	2	1	1	0
Outer West and Blue Mountains	n.a.	12	8	6	2
Parramatta	63.2%	29	19	12	7
Ryde	66.7%	23	18	12	6
South West	81.0%	27	21	17	4
Sutherland	77.8%	21	18	14	4
Melbourne sub-regions					
Inner	63.5%	170	145	92	53
Inner East	79.5%	94	73	58	15
Inner South	74.1%	146	112	83	29
North East	80.6%	171	139	112	27
North West	69.4%	141	111	77	34
Outer East	76.6%	87	64	49	15
South East	73.7%	137	95	70	25
West	63.4%	199	164	104	60
Mornington Peninsula	79.0%	24	19	15	4
Regional SA4					
Newcastle and Lake Macquarie	n.a.	10	9	8	1
Illawarra	n.a.	6	6	3	3
Gold Coast	44.9%	71	69	31	38
Sunshine Coast	57.1%	19	14	8	6
Geelong	n.a.	11	7	7	0

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

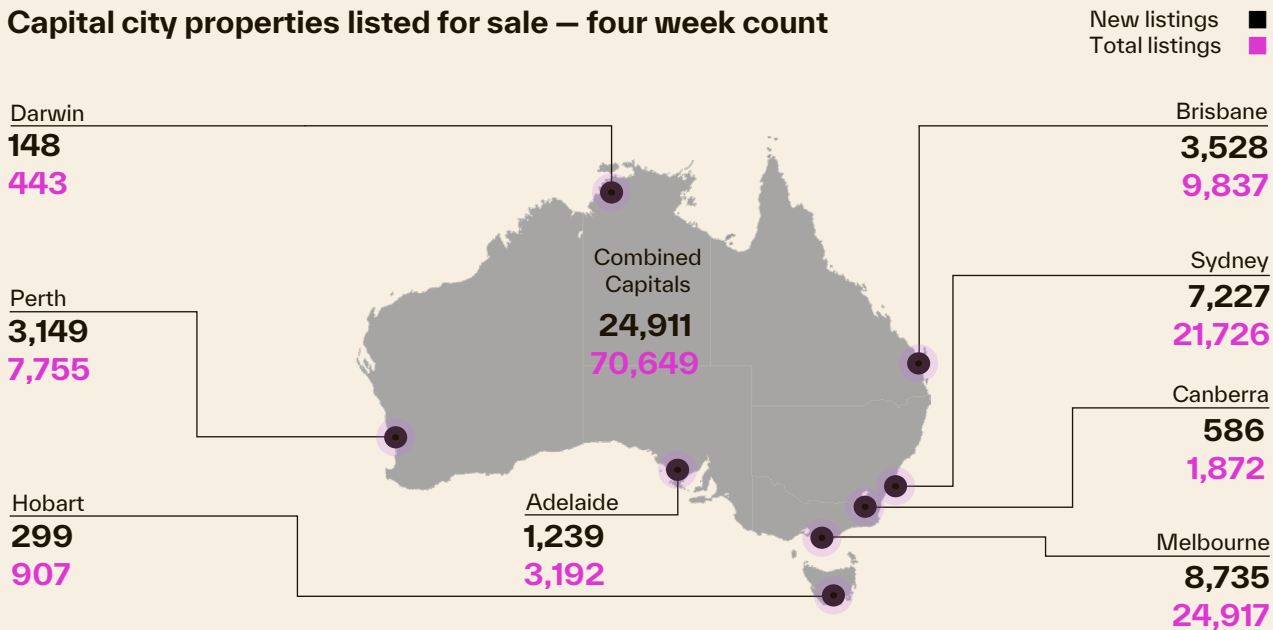


Results are based on the Cotality Daily Home Value Index. Further information and daily updates on the index results are available from <https://www.cotality.com/au/our-data/indices>.

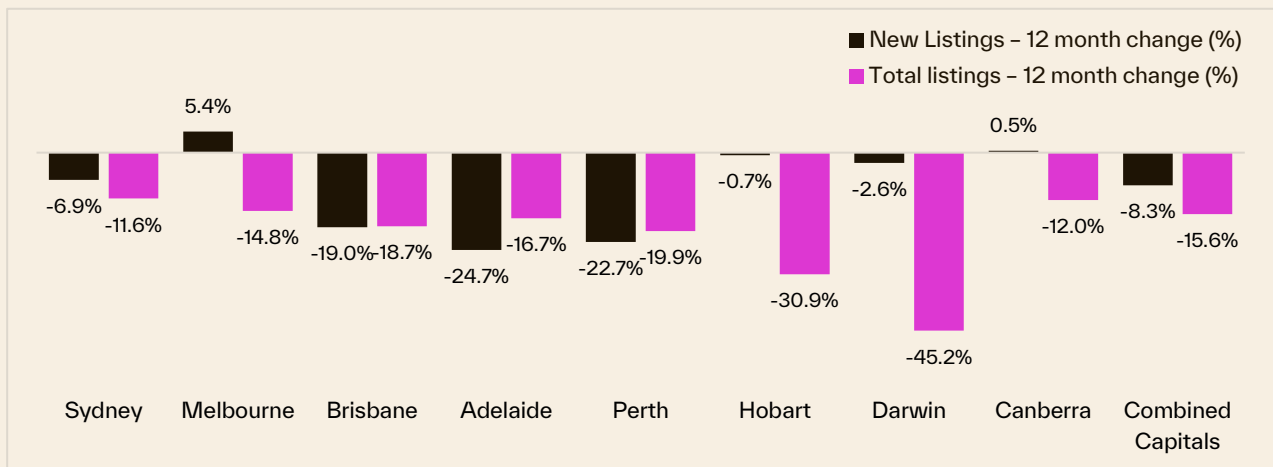
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Property Market Indicator Summary

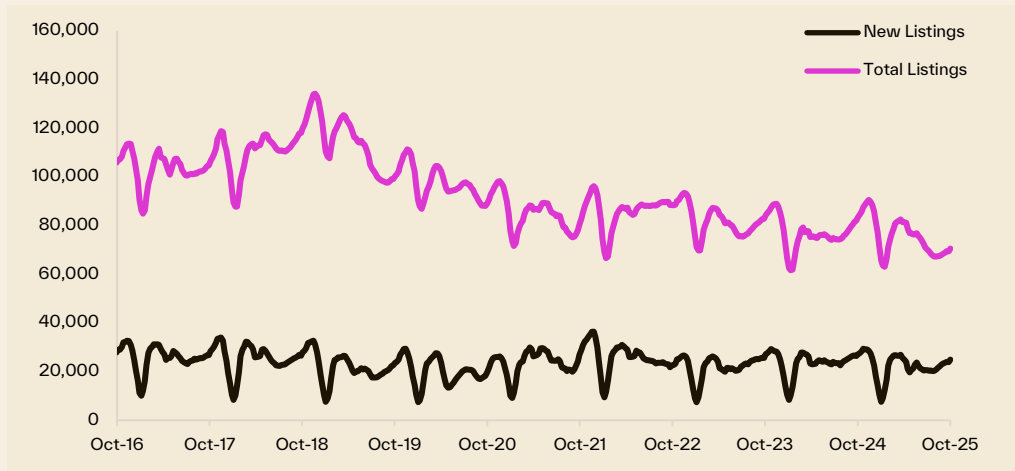
Capital city properties listed for sale – four week count



Listings – 12 month change (%)



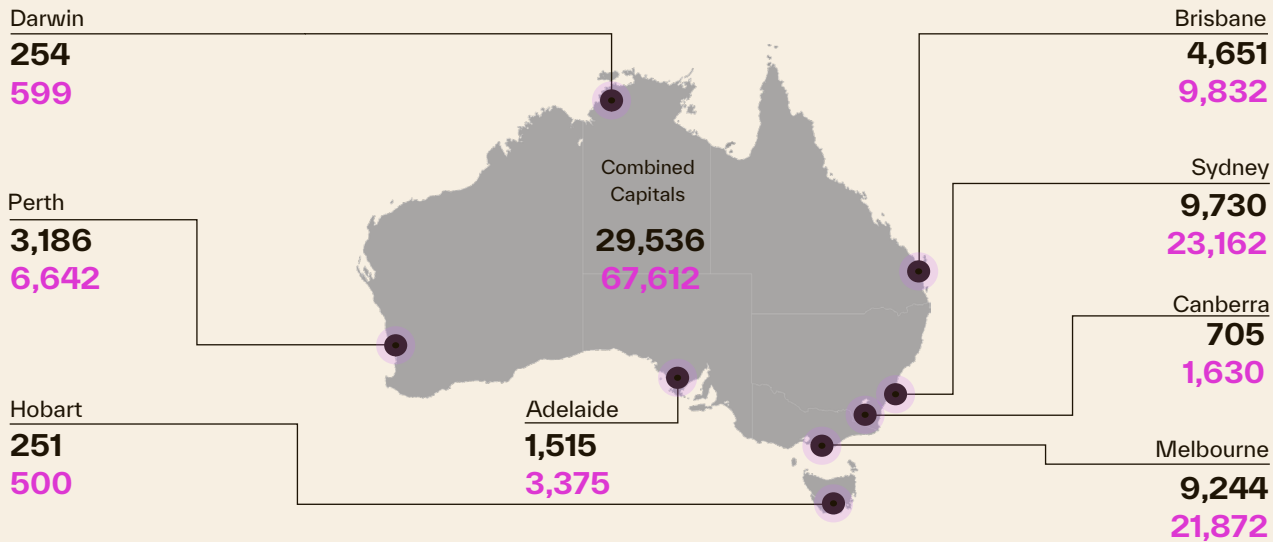
Number of homes for sale, combined capital cities



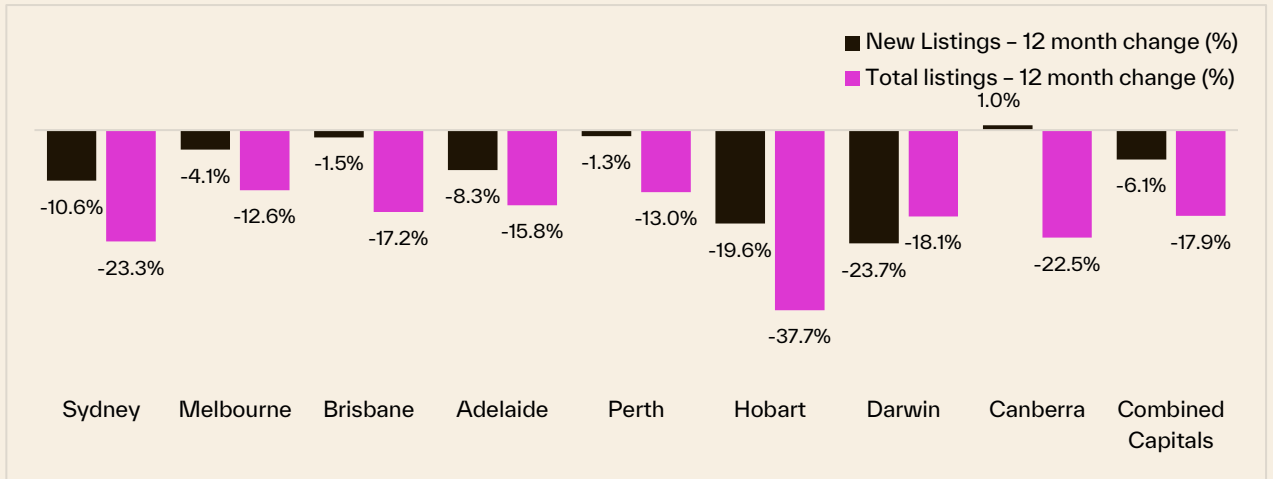
These results are calculated across properties that have been advertised for sale over the 28 days ending 05 October 2025. A new listing is one which has not been previously advertised for sale within 75 days, total listings include new

Property Market Indicator Summary

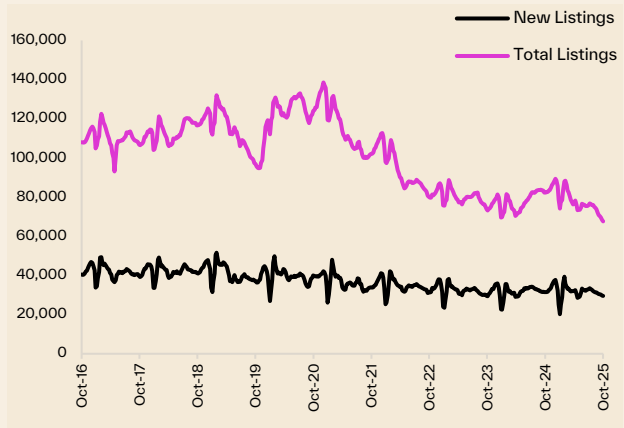
Capital city properties listed for rent – four week count



Rental listings – 12 month change (%)



Number of homes for rent, combined capital cities



Rental snapshot – data to September 2025

Region	Median rent	Change in rents (all dwellings)			Gross yields (all dwellings)		Vacancy rates (all dwellings)	
		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%

Property Market Indicator Summary

Top two sales over the past week, states and territories

New South Wales



6/9 Elamang Avenue
Kirribilli

3 2 2

\$15,000,000

Ray White Lower North Shore Group



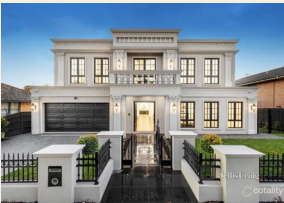
24 North Avoca Parade
North Avoca

4 4 2

\$12,500,000

LJ Hooker Terrigal

Victoria



10 Crown Street
Glen Waverley

5 5 2

\$4,450,000

Jellis Craig Glen Waverley



57 Polaris Drive
Doncaster East

5 5 2

\$3,880,000

Barry Plant Manningham

Queensland



17 Queen Anne Court
Sovereign Islands

4 5 7

\$6,250,000

Ivy Realty



9/166 Oxlade Drive
New Farm

3 2 4

\$6,037,500

Ray White New Farm

South Australia



29 Marlborough Street
Malvern

5 3 4

\$2,900,000

Raine & Horne Unley



1 Carr Avenue
Frewville

4 3 2

\$2,535,000

Belle Property Norwood

Western Australia



15 Roberts Road
Abbey

5 2 2

\$2,200,000

Busselton Agency



158 Estuary Road
Dawesville

4 3 4

\$2,200,000

Ray White Mandurah

Property Market Indicator Summary

Top two sales over the past week, states and territories

Tasmania



30 Cedar Street
Lindisfarne

 4  2  2

\$1,180,000

Petrusma Property Hobart



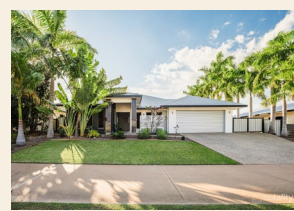
8 Queens Parade
Kingston

 4  2  2



\$990,500

Petrusma Property Hobart

Northern Territory




220 Forrest Parade
Bellamack




 4  2  2

\$915,000

Smith Real Estate NT



6/3 Warrego Court
Larrakeyah

 3  2  2



\$700,000

Smith Real Estate NT

Australian Capital Territory



4A Ebdon Street
Ainslie


 4  2  0

\$2,180,000

Home By Holly



71 Kent Street
Deakin

 4  3  2

\$1,820,000

Hive Property

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