Property Market Indicator Summary

All data to week ending 2nd August 2026

Clearance rates lift to three-week high but the 55% ceiling holds

The preliminary auction clearance rate rose 1.1 percentage points last week to 53.6%, continuing a trend of improvement from the June low of 47.4%. It was the highest preliminary clearance rate in three weeks, though the tenth in a row where the rate held below 55%.

A lower withdrawal rate contributed to the improvement. At 19.7%, withdrawals remain above last year's average of 11.8% but have declined from the recent high of 23.7% in the week ending June 21st.

Nationally, 1,273 auctions were held, down 10% week on week and 19.2% lower than at the same time last year. It was the eleventh straight week where volumes fell short of year-ago levels, reflecting lower vendor activity and the likelihood that fewer sellers chose to go to auction while clearance rates remained so low.

Melbourne continued to outpace Sydney on clearance rates, with 59.6% of auctions clearing compared with 49.7% in Sydney. It was Melbourne's highest preliminary clearance rate since the week ending May 24th (60.2%). The city also recorded a substantially lower withdrawal rate: 15.7% of scheduled auctions were pulled from the market, compared with 28.3% in Sydney. 572 auctions were held, down 19.4% week on week and 21.6% lower than a year ago.

Sydney held 407 auctions, a 4.5% decrease from the previous week and 28.7% below last year's level. The preliminary clearance rate fell to 49.7% after reaching 56.1% the week before.

Auction volumes increased in Brisbane, with 139 auctions held, representing a 5.2% rise from the previous week and an 8.6% increase compared to the same period last year. The preliminary clearance rate in Brisbane rose to 42.0%, surpassing 40% after remaining below that threshold for six of the past eight weeks.

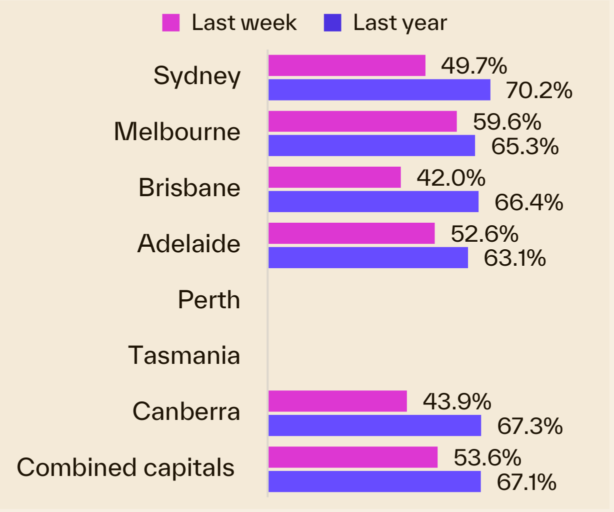
Auction activity across Adelaide eased over the week, with 92 homes taken to auction, down 8%. However, volumes were still 9.5% higher compared with a year ago, while the city maintained a 52.6% preliminary clearance rate.

Auction activity strengthened across the ACT, where 53 homes went under the hammer, up 42% from 37 the week prior. Despite the weekly increase, volumes were 3.6% lower than a year ago, while the territory's result fell 9.2 percentage points to a 43.9% preliminary clearance rate. Across the smaller auction markets, Perth recorded ten auctions, while Tasmania recorded none.

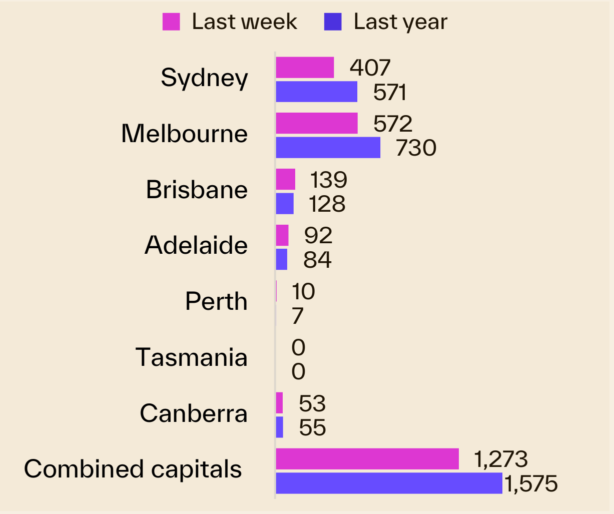
This week, approximately 1,400 homes are scheduled for auction, with about 1,300 expected next week.

Capital City Auction Statistics (Preliminary)

Clearance rate



Total auctions



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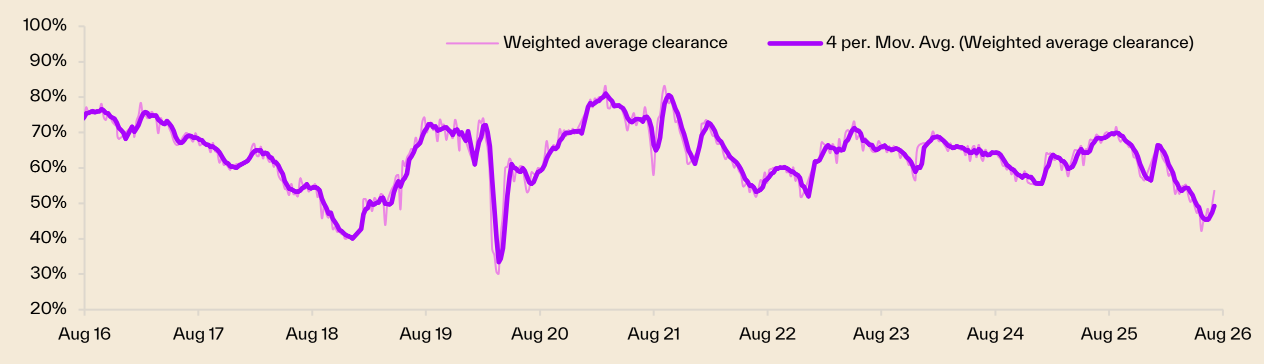
Property Market Indicator Summary

Capital City Auction Statistics (Preliminary)

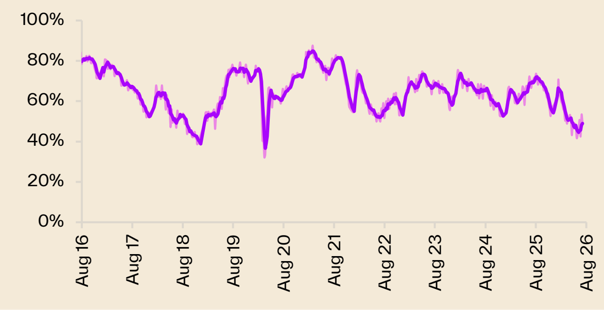
City	Clearance rate	Total auctions	Cotality auction results	Cleared auctions	Uncleared auctions
Sydney	49.7%	407	318	158	160
Melbourne	59.6%	572	453	270	183
Brisbane	42.0%	139	100	42	58
Adelaide	52.6%	92	57	30	27
Perth	n.a.	10	8	7	1
Tasmania	n.a.	0	0	0	0
Canberra	43.9%	53	41	18	23
Combined capitals	53.6%	1,273	977	523	454

Weekly clearance rates

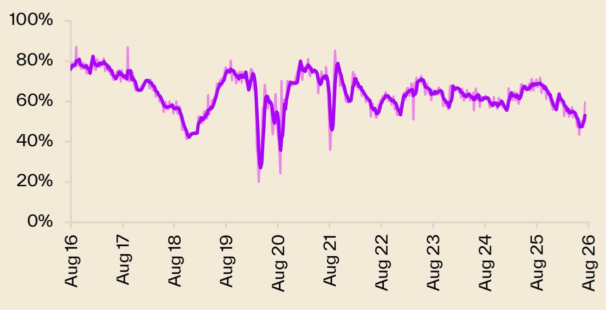
Combined capital cities



Sydney

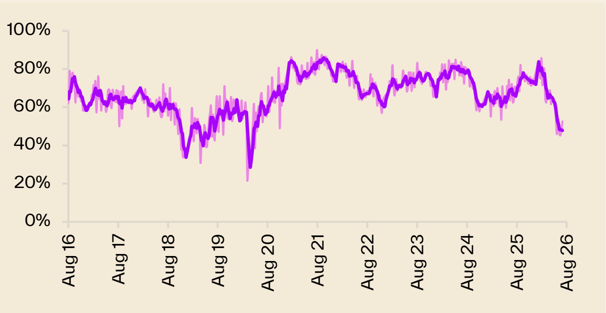


Melbourne



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	n.a.	8	5	3	2
Baulkham Hills and Hawkesbury	69.2%	21	13	9	4
Blacktown	50.0%	22	10	5	5
City and Inner South	40.0%	44	40	16	24
Eastern Suburbs	50.0%	21	20	10	10
Inner South West	47.5%	49	40	19	21
Inner West	46.0%	44	37	17	20
North Sydney and Hornsby	59.2%	61	49	29	20
Northern Beaches	46.2%	14	13	6	7
Outer South West	n.a.	1	0	0	0
Outer West and Blue Mountains	n.a.	4	3	1	2
Parramatta	38.1%	53	42	16	26
Ryde	57.1%	25	21	12	9
South West	50.0%	20	10	5	5
Sutherland	68.8%	21	16	11	5
Melbourne sub-regions					
Inner	59.5%	87	74	44	30
Inner East	68.0%	58	50	34	16
Inner South	59.6%	66	52	31	21
North East	55.8%	71	52	29	23
North West	62.1%	75	58	36	22
Outer East	74.2%	41	31	23	8
South East	61.1%	72	54	33	21
West	46.5%	88	71	33	38
Mornington Peninsula	63.6%	14	11	7	4
Regional SA4					
Newcastle and Lake Macquarie	40.0%	16	15	6	9
Illawarra	n.a.	9	6	3	3
Gold Coast	27.1%	64	48	13	35
Sunshine Coast	40.9%	31	22	9	13
Geelong	n.a.	7	2	1	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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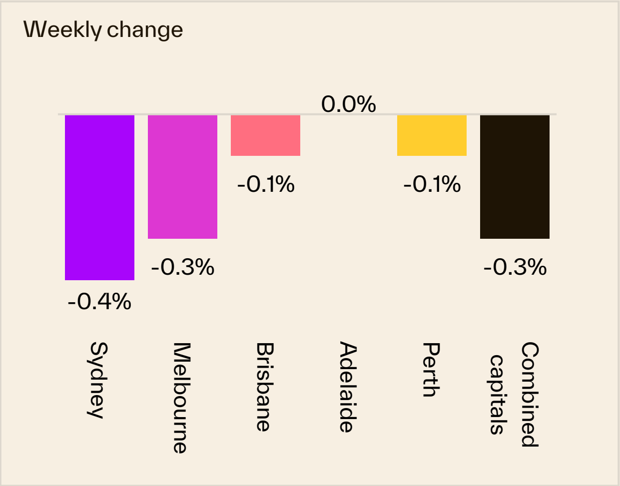
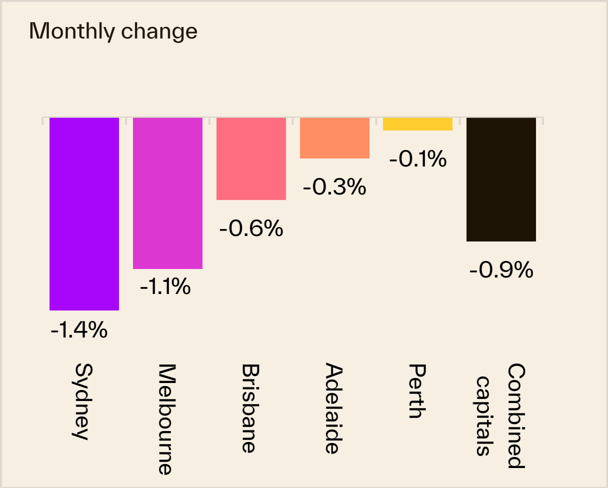
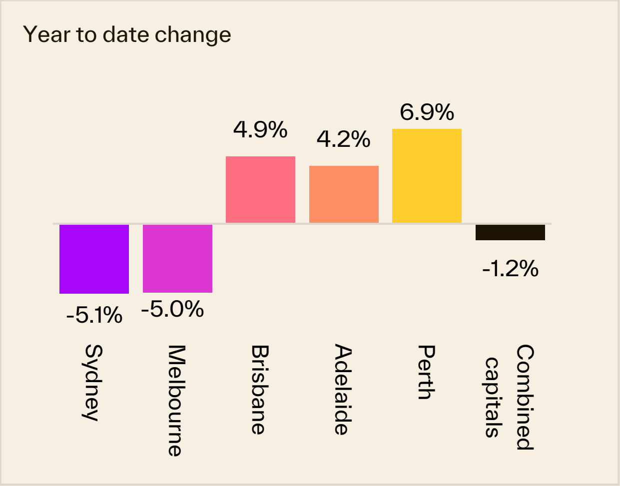
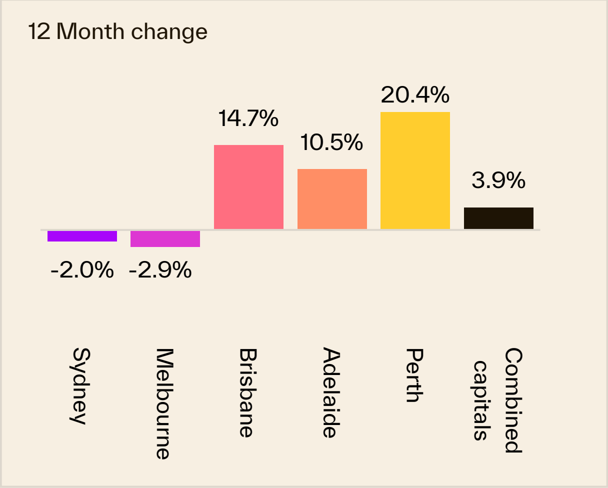
Property Market Indicator Summary

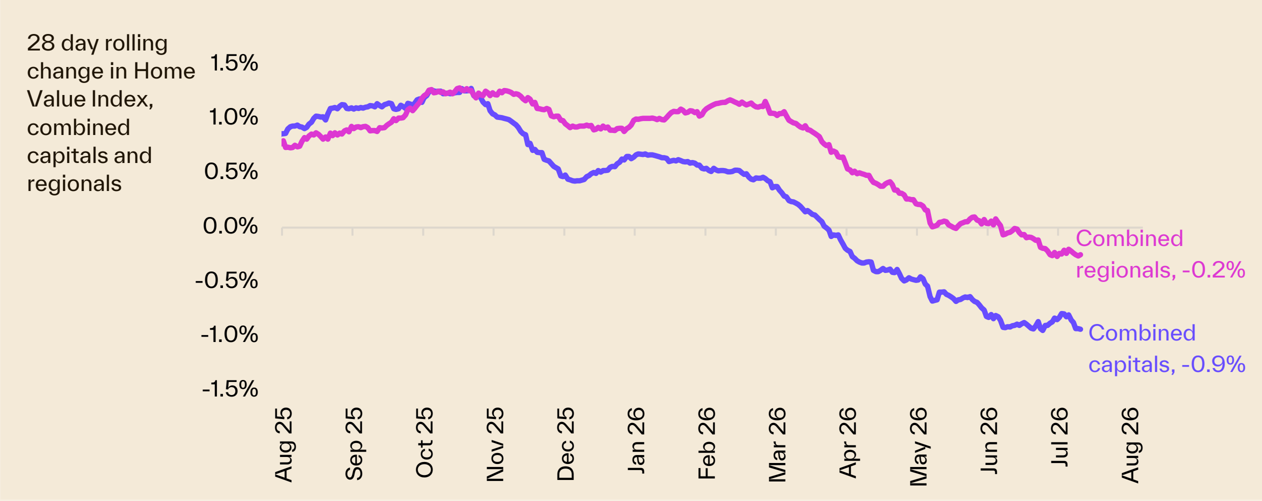
Capital city home value changes











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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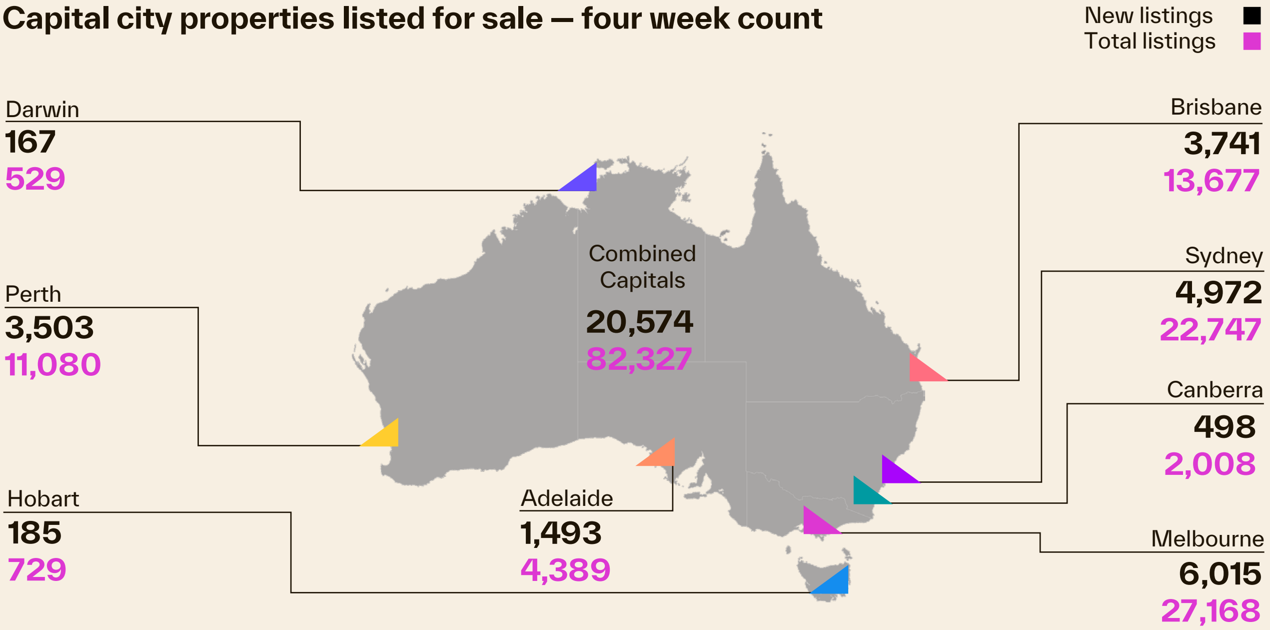
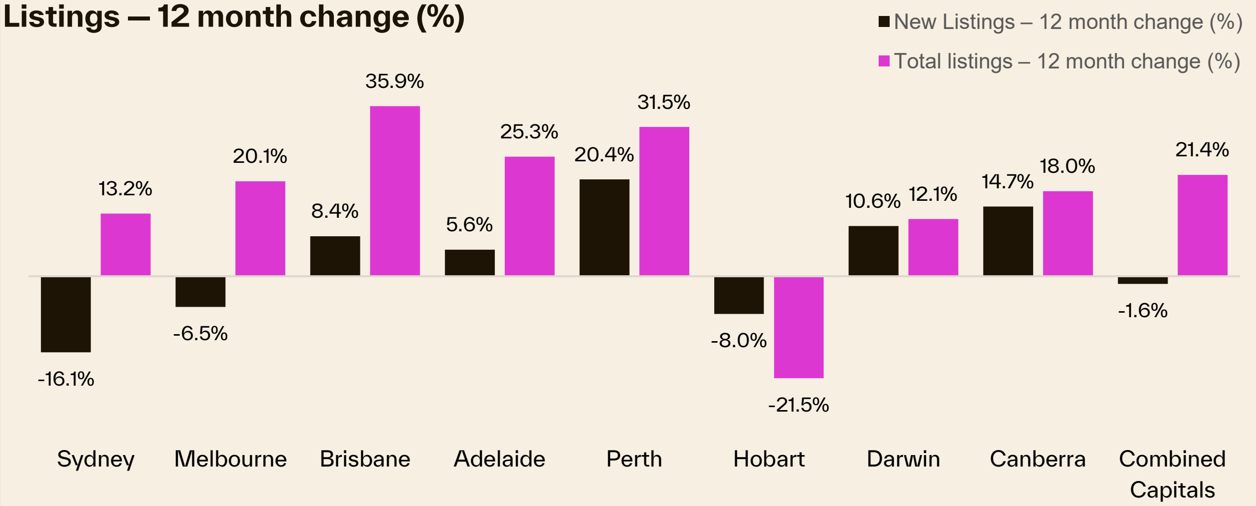
Property Market Indicator Summary

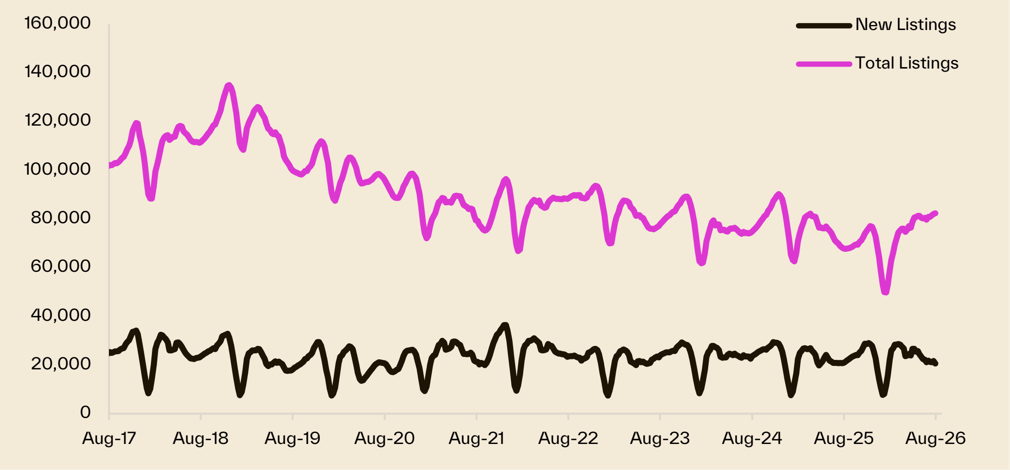
Capital city properties listed for sale — four week count



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 02 August 2026. 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.

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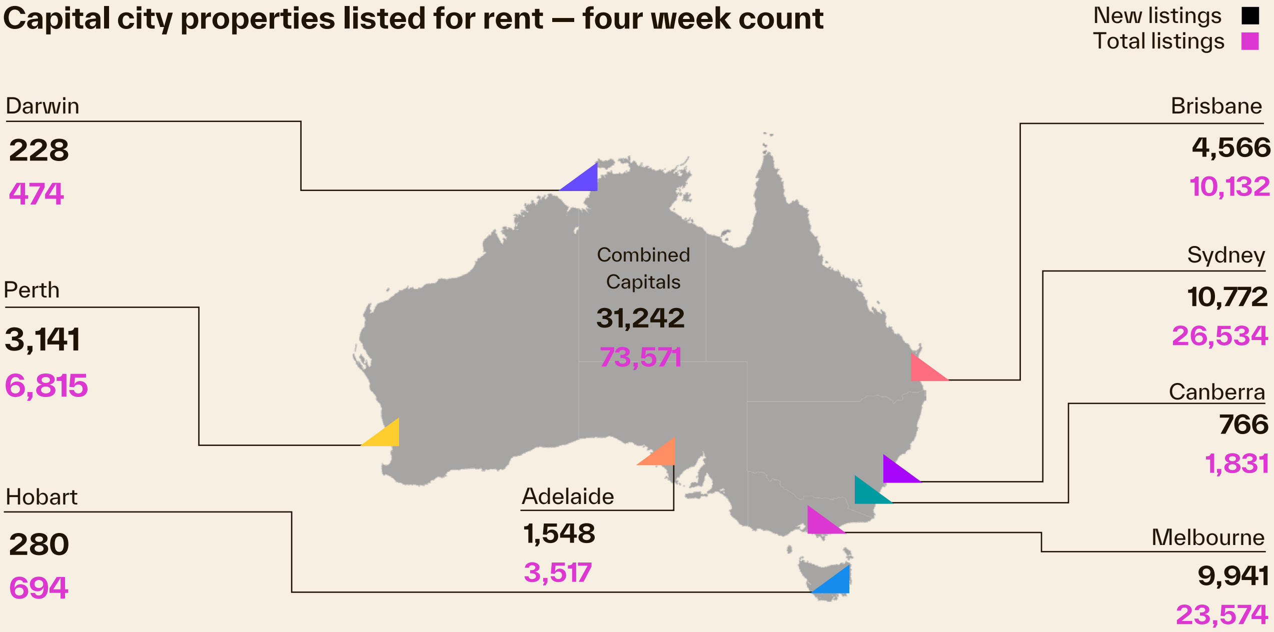
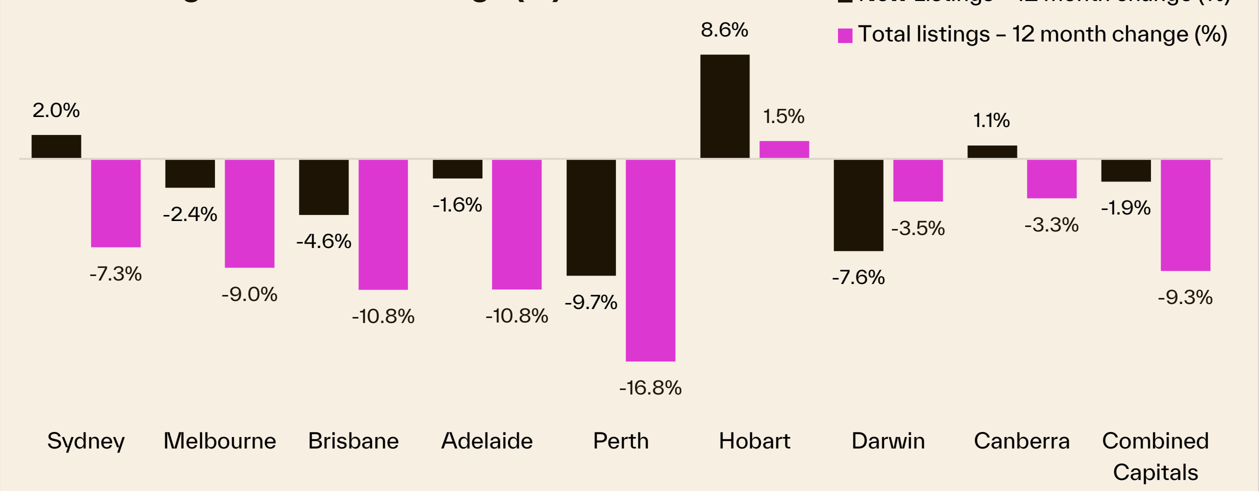
Property Market Indicator Summary

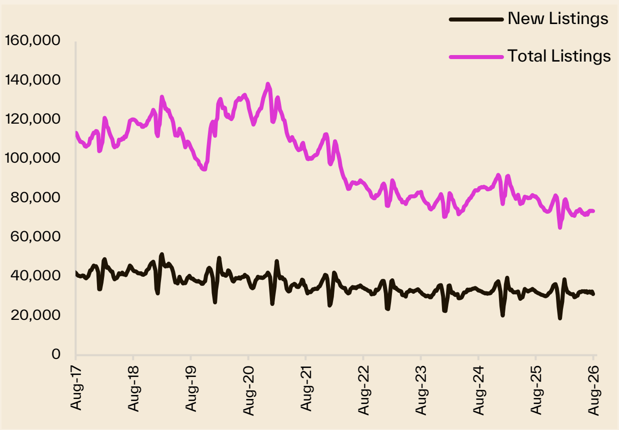
Capital city properties listed for rent — four week count



Rental listings — 12 month change (%)



Number of homes for rent, combined capital cities



Rental snapshot — data to July 2026

		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	$843	-0.1%	0.7%	5.5%	3.3%	3.0%	2.1%	2.1%
Melbourne	$646	0.3%	1.2%	5.1%	4.0%	3.6%	1.5%	1.6%
Brisbane	$740	0.6%	1.7%	6.6%	3.4%	3.6%	1.9%	1.9%
Adelaide	$666	0.5%	1.6%	5.3%	3.5%	3.6%	1.2%	1.1%
Perth	$786	0.3%	1.8%	8.1%	3.8%	4.2%	1.5%	1.5%
Hobart	$629	-0.4%	1.5%	8.0%	4.3%	4.3%	2.3%	1.6%
Darwin	$740	1.8%	4.4%	10.4%	6.2%	6.6%	1.3%	1.5%
Canberra	$706	0.1%	0.7%	3.3%	4.2%	4.1%	2.0%	1.8%
Combined capitals	$741	0.2%	1.2%	5.9%	3.6%	3.4%	1.8%	1.8%
Combined regionals	$622	0.3%	1.1%	5.9%	4.2%	4.3%	1.9%	1.9%
National	**$708**	**0.2%**	**1.2%**	**5.9%**	**3.7%**	**3.7%**	**1.8%**	**1.8%**

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Property Market Indicator Summary

Top two sales over the past week, states and territories

New South Wales

24B Annette Street
Oatley

5 4 2

$5,600,000

McGrath Oatley

8 Marion Street
Strathfield

5 4 3

$4,695,000

McGrath Strathfield

Victoria

38 The Outlook
Glen Waverley

5 5 2

$4,500,000

Jellis Craig Glen Waverley

13 Bowen Street
Malvern East

5 3 2

$2,450,000

Colella

Queensland

9 Sunnymeade Place
Mudgeeraba

5 5 3

$8,650,000

Kollosche

30 Buccaneer Court
Paradise Waters

5 5 3

$6,200,000

Kollosche

South Australia

96 Osmond Terrace
Norwood

4 2 2

$2,900,000

Ray White Norwood

78 Frederick Street
Maylands

3 1 2

$2,200,000

Ray White Kensington

Western Australia

25 Walter Street
Claremont

4 3 2

$4,100,000

Shellabears Real Estate

12 Manor Approach
Baldivis

4 2 2

$1,910,000

Ray White Rockingham Baldivis

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Property Market Indicator Summary

Top two sales over the past week, states and territories

Tasmania

9 Estate Drive
Acton Park

3 2 3

$1,075,000

Insitu Property Hobart

2/35 Valley Street
West Hobart

4 2 3

$1,060,000

View Hobart

Northern Territory

25 Latrobe Street
Bayview

3 1 2

$905,000

Ray White Darwin

16 Gerardine Crescent
Bellamack

4 2 2

$820,000

Coles and Carter

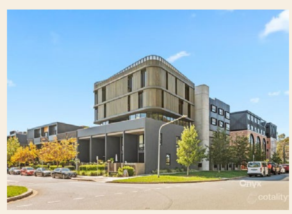
Australian Capital Territory

45 Akame Circuit
O'Malley

4 2 2

$1,990,000

Blewitt Properties



G13/2 Parbery Street
Kingston

3 2 2

$1,375,000

Onyx Property Agency

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Property Market Indicator Summary

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