Property Market Indicator Summary

All data to week ending 30th August 2026

Auction volumes lift 6.6% as clearance rate eases to 52.4%

Auction clearance rates eased last week, with preliminary results coming in at 52.4% for the combined capital cities. Last week's clearance rate was lower than the previous week's 53.2%. The softer result followed a brief improvement through mid-August, when preliminary clearance rates rose above the 55% mark over the weeks ending August 9 and August 16.

The lower preliminary clearance rate occurred alongside increased auction activity last week. A total of 1,482 capital city homes went to auction, up 6.6% from the previous week. Auction volumes are expected to continue rising as the weather improves, with approximately 1,500 homes scheduled for the first week of spring and over 1,600 the following week. This seasonal increase will test buyer demand, though activity is unlikely to match last year's levels.

Auction volumes remain well below last year's levels, down 32.3% compared to the same week last year. This softer trend defined much of this winter's auction market, with capital city volumes ending the season about 18% lower than winter 2022. The annual decline was concentrated in the largest markets, with winter volumes down approximately 25% in Sydney, 19% in Melbourne, and 14% in the ACT. In contrast, Perth, Adelaide, and Brisbane saw increases of 20%, 6.9%, and 0.4% respectively.

In Melbourne, 653 homes went under the hammer, the highest of any capital city last week, up 9.9% from the week prior, though almost 40% fewer than a year ago. The preliminary clearance rate eased for a third week in a row to 54.9%, down from 55.4% the previous week, and that was below the recent peak of 60.8% recorded over the week ending August 9.

Sydney's preliminary clearance rate has remained above 55% for four consecutive weeks, easing slightly to 56.3% from 56.6%. The city held 516 auctions, the second-highest among the capitals, up 8.2% from the previous week but 36.3% lower than a year ago.

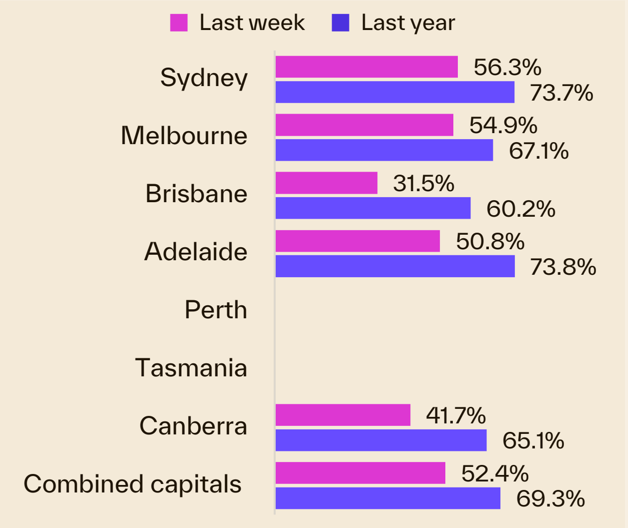
Among the smaller capital cities, Brisbane again had the most volume, with 149 homes taken to auction, 1.3% down on the previous week and 21.1% up on the same week last year. The preliminary clearance rate fell to 31.5%, down 8.9 percentage points from 40.4% the previous week and the lowest early result since the first week of July.

Adelaide's preliminary clearance rate was 50.8%, a decrease of 4.1 percentage points from the previous week. Auction volumes in the city increased by 16.7% from the previous week to 105, which is 1.9% higher than a year ago.

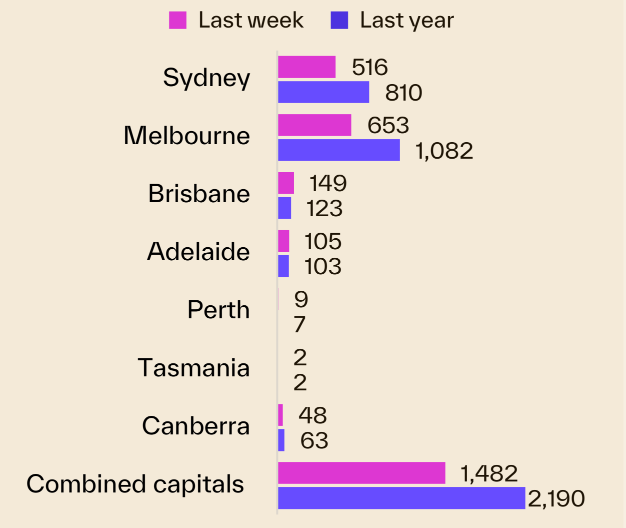
The smaller markets held few auctions, in the ACT 48 auctions took place, down by 27% from the previous week and 24% from a year ago, though its preliminary clearance rate edged up 30 basis points to 41.7%. Perth held 9 auctions and only 2 auctions took place in Tasmania.

Capital City Auction Statistics (Preliminary)

Clearance rate



Total auctions



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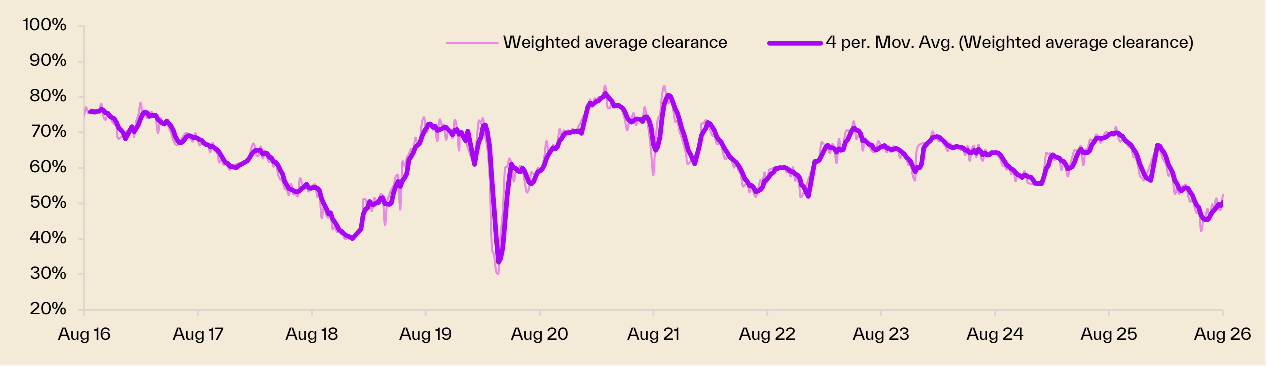
Property Market Indicator Summary

Capital City Auction Statistics (Preliminary)

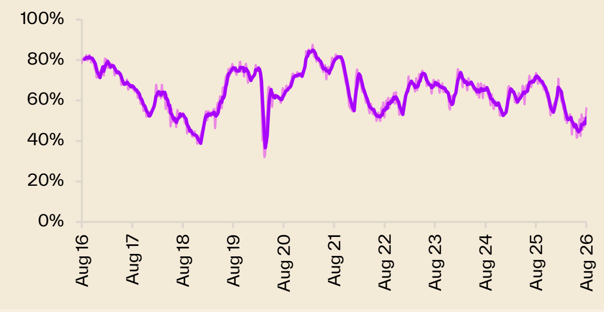
City	Clearance rate	Total auctions	Cotality auction results	Cleared auctions	Uncleared auctions
Sydney	56.3%	516	414	233	181
Melbourne	54.9%	653	541	297	244
Brisbane	31.5%	149	92	29	63
Adelaide	50.8%	105	65	33	32
Perth	n.a.	9	3	2	1
Tasmania	n.a.	2	2	2	0
Canberra	41.7%	48	36	15	21
Combined capitals	**52.4%**	**1,482**	**1,153**	**605**	**548**

Weekly clearance rates

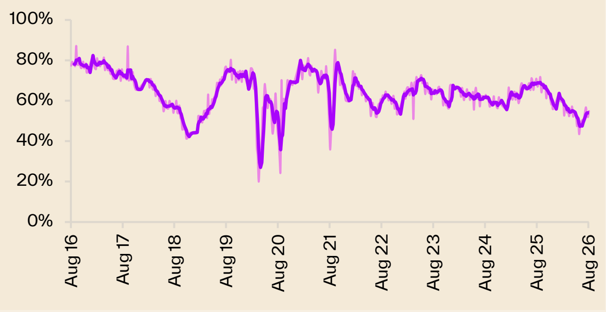
Combined capital cities



Sydney

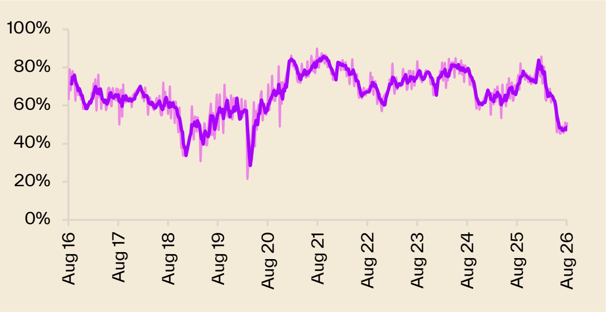


Melbourne



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.	6	4	1	3
Baulkham Hills and Hawkesbury	36.4%	20	11	4	7
Blacktown	33.3%	31	12	4	8
City and Inner South	57.1%	53	49	28	21
Eastern Suburbs	69.4%	55	49	34	15
Inner South West	66.0%	68	53	35	18
Inner West	47.7%	47	44	21	23
North Sydney and Hornsby	61.8%	88	76	47	29
Northern Beaches	47.6%	22	21	10	11
Outer South West	n.a.	2	2	2	0
Outer West and Blue Mountains	n.a.	7	4	0	4
Parramatta	65.5%	42	29	19	10
Ryde	50.0%	33	28	14	14
South West	27.8%	24	18	5	13
Sutherland	61.5%	17	13	8	5
Melbourne sub-regions					
Inner	49.5%	106	97	48	49
Inner East	61.5%	79	65	40	25
Inner South	51.2%	110	86	44	42
North East	53.9%	79	65	35	30
North West	64.1%	76	64	41	23
Outer East	47.7%	51	44	21	23
South East	63.3%	61	49	31	18
West	53.2%	82	62	33	29
Mornington Peninsula	50.0%	10	10	5	5
Regional SA4					
Newcastle and Lake Macquarie	n.a.	10	8	6	2
Illawarra	n.a.	4	4	3	1
Gold Coast	40.0%	56	40	16	24
Sunshine Coast	45.0%	31	20	9	11
Geelong	n.a.	4	3	1	2

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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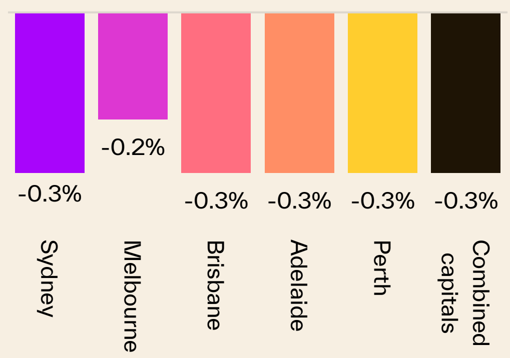
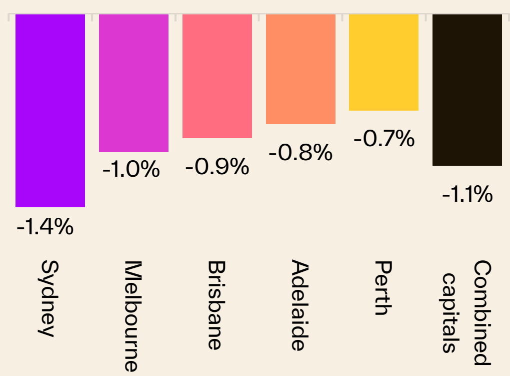
Property Market Indicator Summary

Capital city home value changes

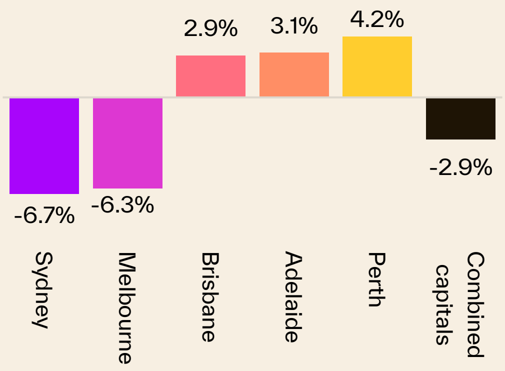
Weekly change



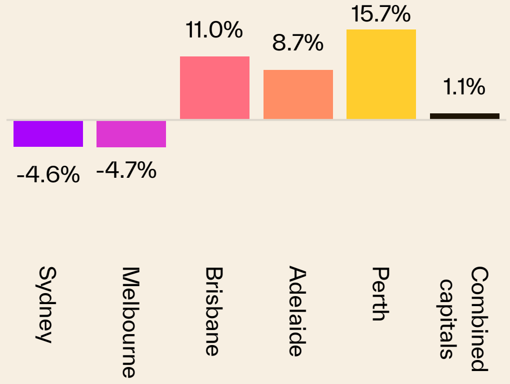
Monthly change



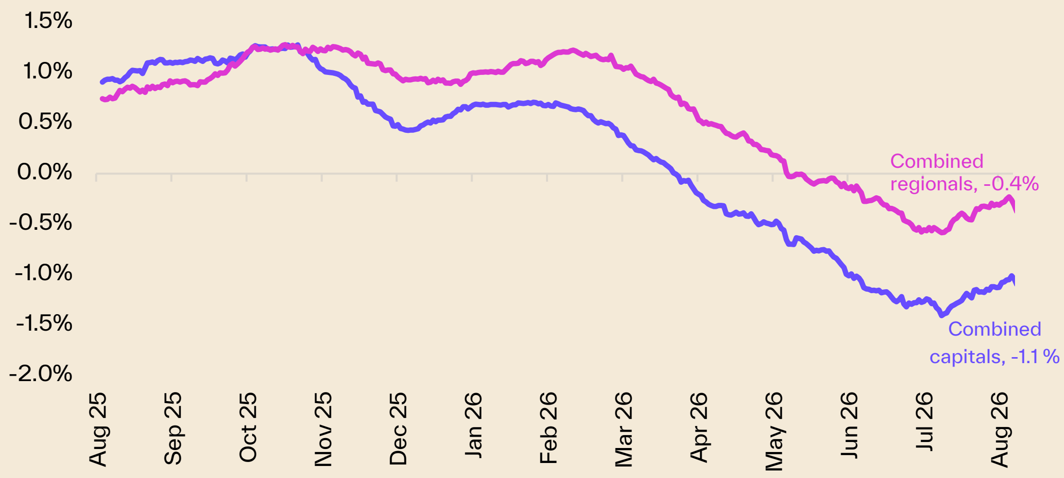
Year to date change



12 Month change



28 day rolling change in Home Value Index, combined capitals and regionals



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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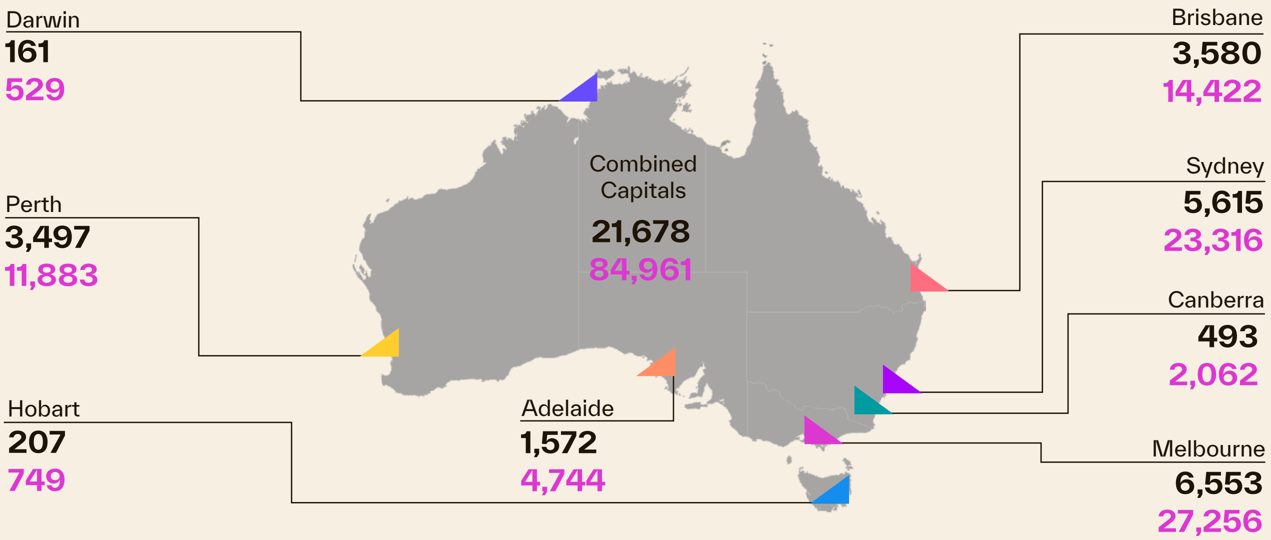
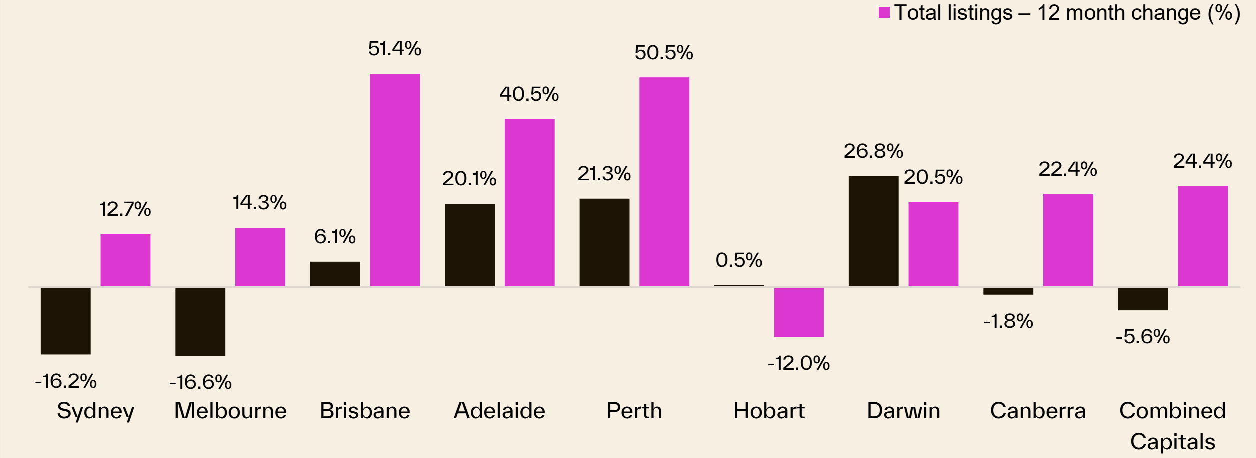
Property Market Indicator Summary

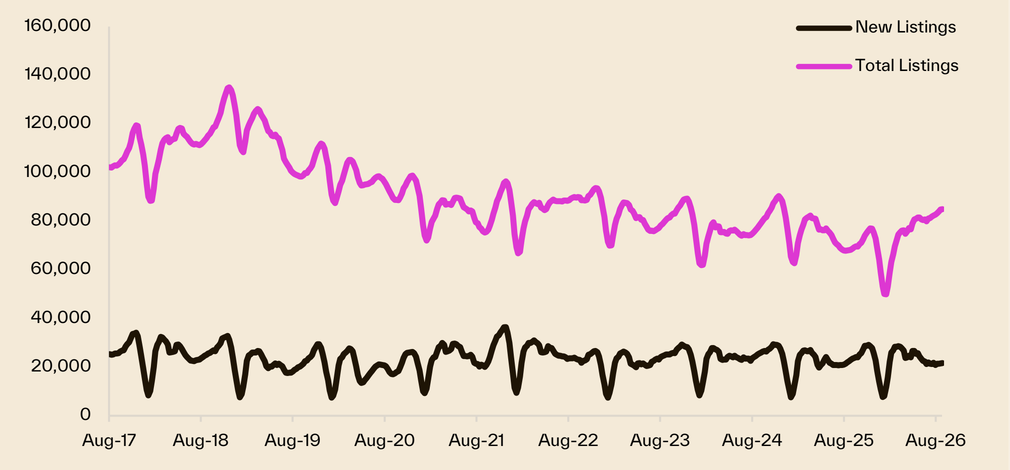
Capital city properties listed for sale — four week count



Listings — 12 month change (%)



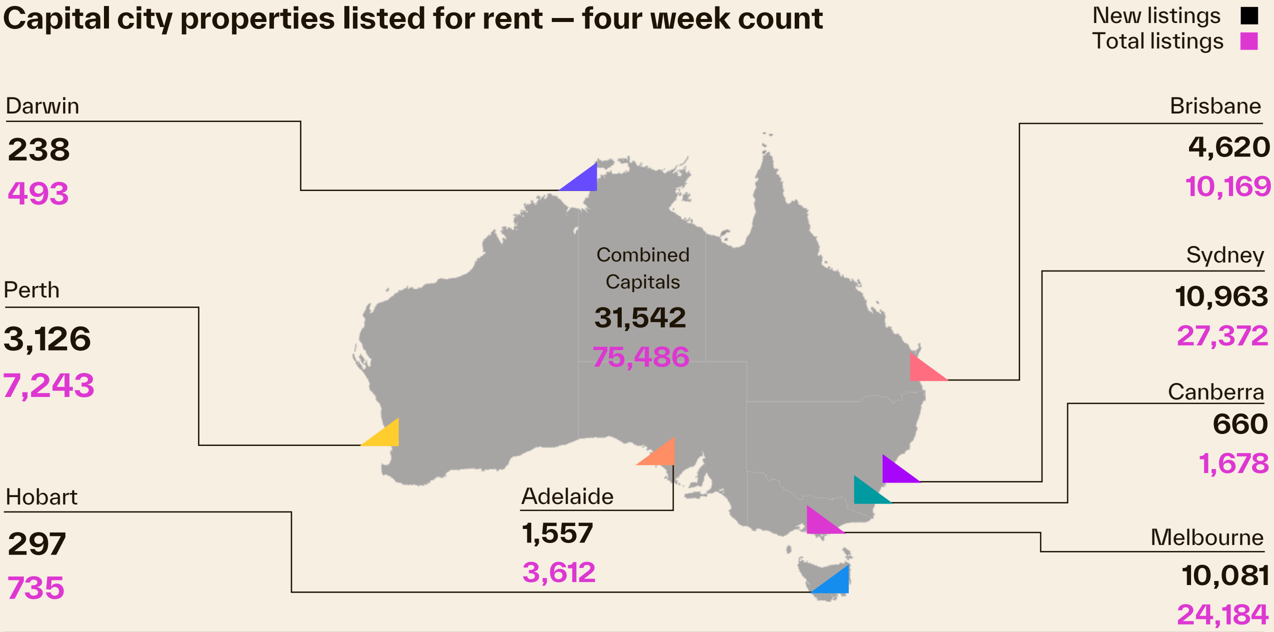
Number of homes for sale, combined capital cities



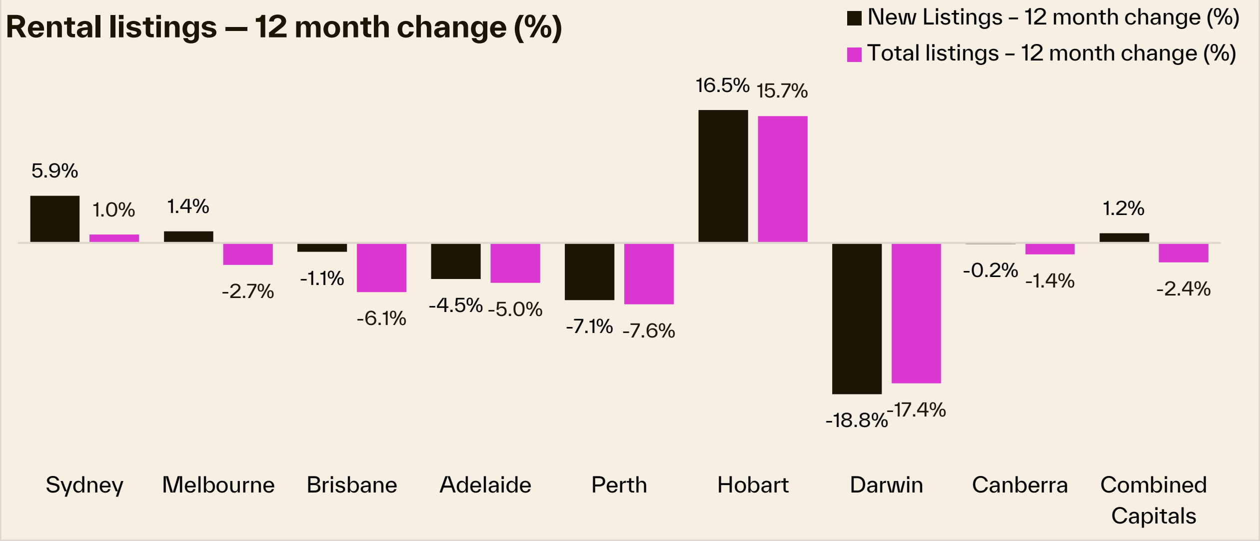
These results are calculated across properties that have been advertised for sale over the 28 days ending 30 August 2026. A new listing is one which has not been previously advertised for sale within 75 days, total listings include new listings and properties which have been previously advertised.

Property Market Indicator Summary

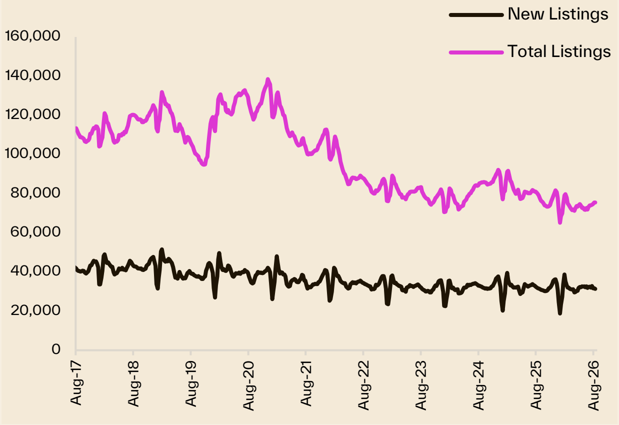
Capital city properties listed for rent — four week count



Rental listings — 12 month change (%)



Number of homes for rent, combined capital cities



Rental snapshot — data to July 2026

Region	Median rent	Change in rents (all dwellings) Month	Quarter	Annual	Gross yields (all dwellings) Current	12 months ago	Vacancy rates (all dwellings) 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

20 Wharf Road
Birchgrove

4 3 2

$8,300,000

Bresic Whitney Balmain

33 Woolwich Road
Hunters Hill

5 2 4

$6,620,000

McGrath Hunters Hill

Victoria

15 Castella Street
Ivanhoe East

4 5 2

$3,300,000

Nelson Alexander - Ivanhoe

65 Fernhill Road
Sandringham

4 2 2

$2,900,000

Hodges Sandringham

Queensland

38 Gretel Drive
Mermaid Waters

4 3 2

$5,000,000

Kollosche

34 Orient Drive
Sunrise Beach

6 4 2

$4,800,000

McLure Prestige

South Australia

72 Marian Road
Payneham

4 1 1

$1,800,000

Eclipse Real Estate

40 Fisher Crescent
Craigburn Farm

4 2 3

$1,775,000

Ray White Flagstaff Hill

Western Australia

583 Lyon Road
Wandi

4 3 2

$2,175,000

Bourkes

45 Ramsdale Street
Doubleview

3 1 1

$1,900,000

Realmark Urban

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Property Market Indicator Summary

Top two sales over the past week, states and territories

Tasmania

15 Freshwater Street
Beaumaris

3 2 2

$1,000,000

The Agency Northern Tasmania

14 Zenith Court
Howrah

4 1 2

$940,000

Harcourts Signature - Rosny Park

Northern Territory

10 Barker Road
Howard Springs

4 2 8

$1,900,000

Piening Property Sales

25 Banksia Street
Nightcliff

5 3 2

$1,812,000

Smart Real Estate

Australian Capital Territory

20 Mackay Crescent
Kambah

5 3 2

$1,825,000

My Morris

37 Cargelligo Street
Duffy

4 2 3

$1,350,000

Luton Properties - Manuka

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Property Market Indicator Summary

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