

Property Market Indicator Summary

All data to week ending 5th July 2026

Combined capital clearance rate holds below 50% for third consecutive week

The combined capitals preliminary clearance rate found a floor over the past three weeks, holding in the high 40% range. Last week's early result increased slightly to 49.8%, up from 49.2% the previous week, but remained below 50% for the third week in a row.

Across the combined capital cities, 1,447 homes were taken to auction last week, 17.2% fewer than the previous week and 19.3% below the same time last year. Auction activity is expected to soften further this week, with around 1,300 homes currently scheduled to go under the hammer.

Melbourne accounted for the largest share of auctions last week, with 582 homes taken under the hammer, 27.9% fewer than the previous week and 24.1% less than a year ago. The preliminary clearance rate rose by 4.3 percentage points to 54.5%, the highest in three weeks, but remained below 60% for the sixth consecutive week.

After two consecutive weeks below 50%, Sydney's preliminary clearance rate rose to 51.6% last week, up from 47.3% the previous week. The city's auction volumes were lower over the week,

with 563 homes taken to auction last week, approximately 10.8% fewer than the previous week and 17.8% below the same time last year.

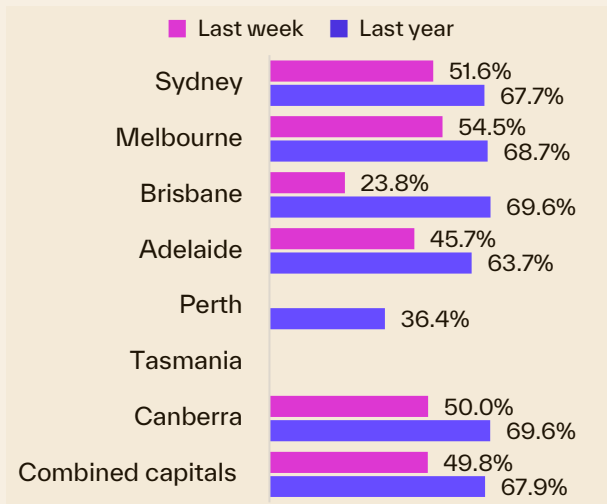
Among the smaller capitals, Brisbane led the volume of auctions with 120 homes taken under the hammer last week, down 11.8% from the previous week and 24.1% lower than a year ago. The preliminary clearance rate was 23.8%, the lowest since early May 2020 (21.4%), and the fourth time in five weeks it has remained below the 40% threshold.

Adelaide recorded a preliminary clearance rate of 45.7% last week, a sharp 23.0 percentage point fall from the previous week's 68.7%. It was the city's second-lowest clearance rate so far this year, after the week ending 21 June, when the clearance rate was 40.0%. Auction volume also eased over the week, with 111 homes taken to auction, down 4.3% from the previous week but 8.8% higher than this time last year.

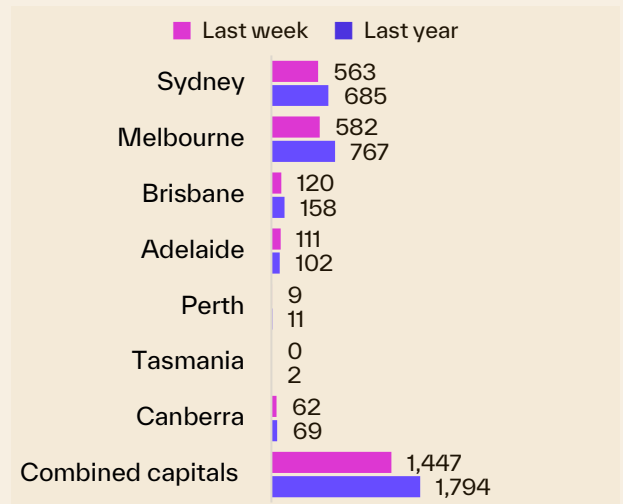
There were just nine auctions in Perth last week, down from 12 over the previous week, while there were no auctions in Tasmania for the third week in a row.

Capital City Auction Statistics (Preliminary)

Clearance rate



Total auctions



Media enquiries: media@cotality.com

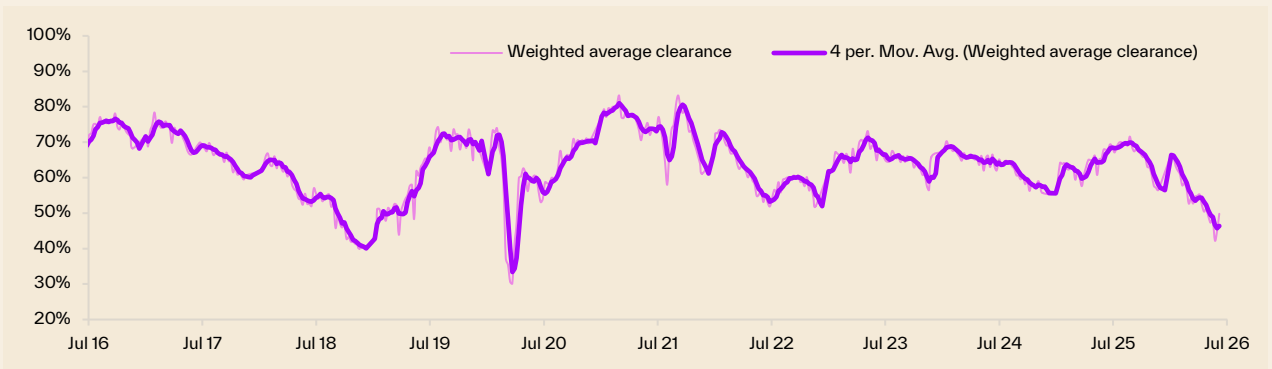
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Capital City Auction Statistics (Preliminary)

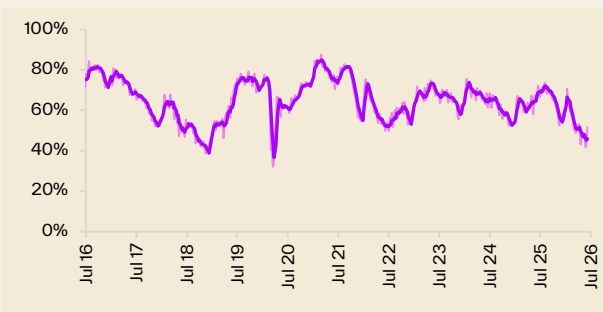
City	Clearance rate	Total auctions	Cotality auction results	Cleared auctions	Uncleared auctions
Sydney	51.6%	563	442	228	214
Melbourne	54.5%	582	451	246	205
Brisbane	23.8%	120	101	24	77
Adelaide	45.7%	111	81	37	44
Perth	n.a.	9	3	1	2
Tasmania	n.a.	0	0	0	0
Canberra	50.0%	62	48	24	24
Combined capitals	49.8%	1,447	1,126	561	565

Weekly clearance rates

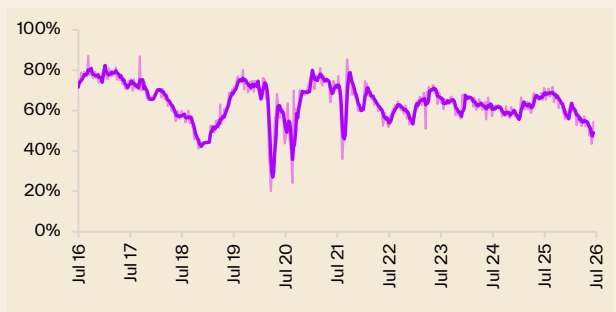
Combined capital cities



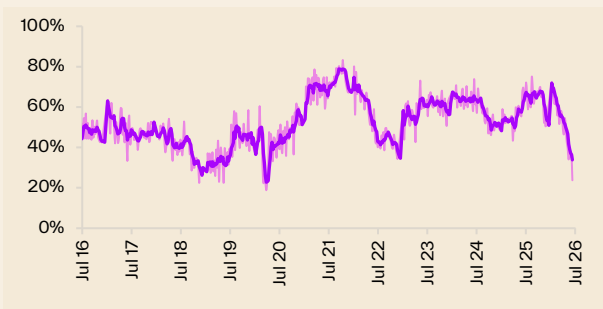
Sydney



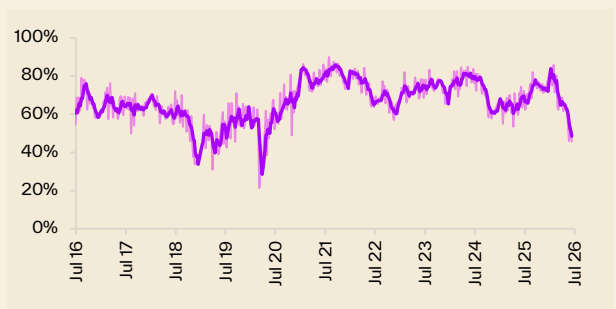
Melbourne



Brisbane



Adelaide



Property Market Indicator Summary

Sub-region auction statistics (Preliminary)

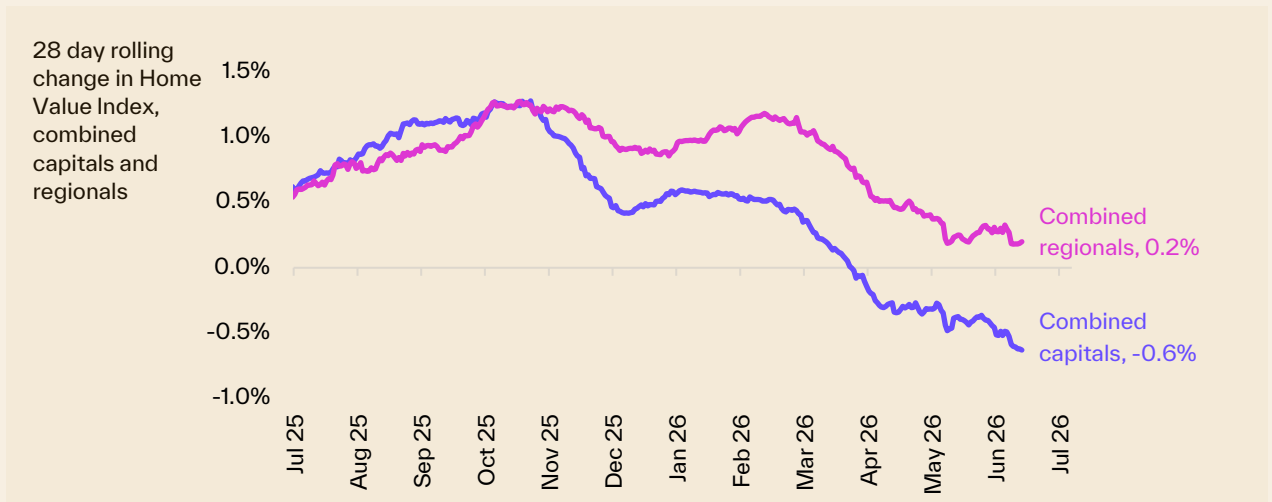
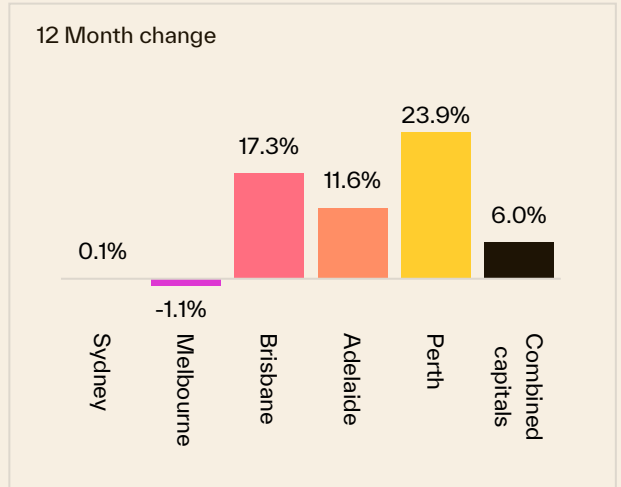
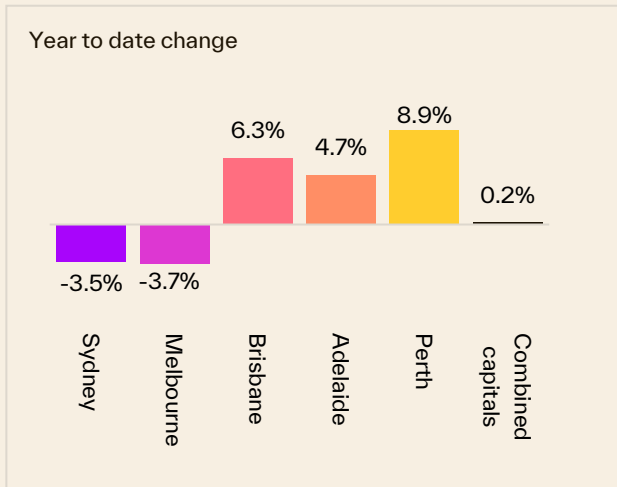
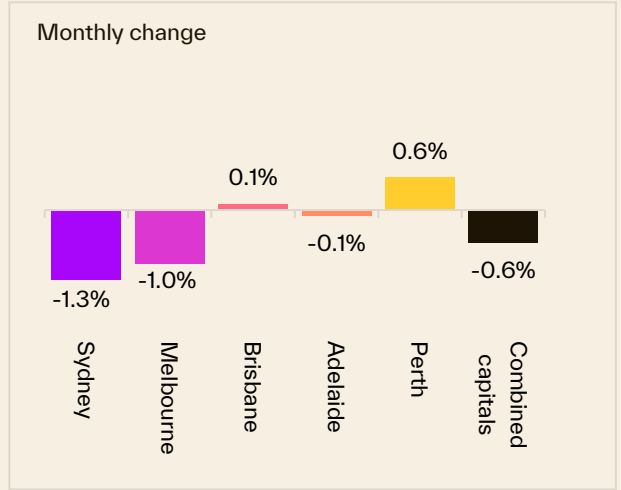
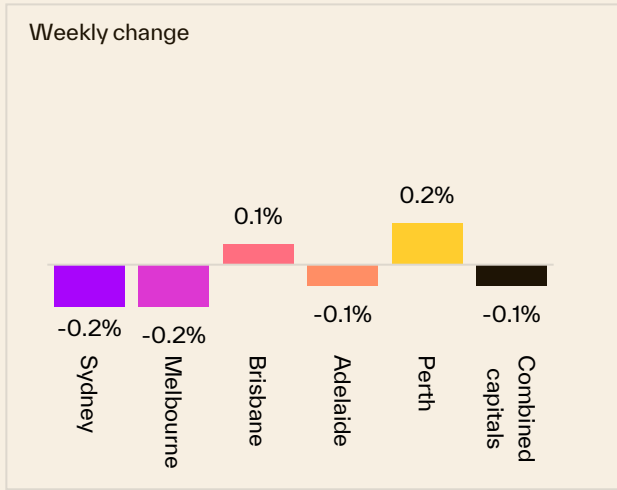
Region	Clearance rate	Total auctions	Collected results	Cleared auctions	Uncleared auctions
Sydney sub-regions					
Central Coast	n.a.	5	3	2	1
Baulkham Hills and Hawkesbury	38.5%	33	26	10	16
Blacktown	60.0%	35	15	9	6
City and Inner South	55.7%	68	61	34	27
Eastern Suburbs	42.0%	53	50	21	29
Inner South West	47.5%	50	40	19	21
Inner West	69.1%	48	42	29	13
North Sydney and Hornsby	54.8%	98	84	46	38
Northern Beaches	45.5%	26	22	10	12
Outer South West	n.a.	2	0	0	0
Outer West and Blue Mountains	n.a.	8	6	1	5
Parramatta	35.3%	48	34	12	22
Ryde	68.4%	31	19	13	6
South West	47.4%	34	19	9	10
Sutherland	63.6%	25	22	14	8
Melbourne sub-regions					
Inner	50.0%	72	62	31	31
Inner East	51.6%	40	31	16	15
Inner South	60.0%	71	50	30	20
North East	65.4%	100	78	51	27
North West	56.7%	85	67	38	29
Outer East	58.3%	33	24	14	10
South East	43.6%	71	55	24	31
West	45.2%	94	73	33	40
Mornington Peninsula	81.8%	16	11	9	2
Regional SA4					
Newcastle and Lake Macquarie	61.1%	18	18	11	7
Illawarra	n.a.	9	6	2	4
Gold Coast	35.7%	64	56	20	36
Sunshine Coast	38.9%	61	54	21	33
Geelong	n.a.	7	4	2	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

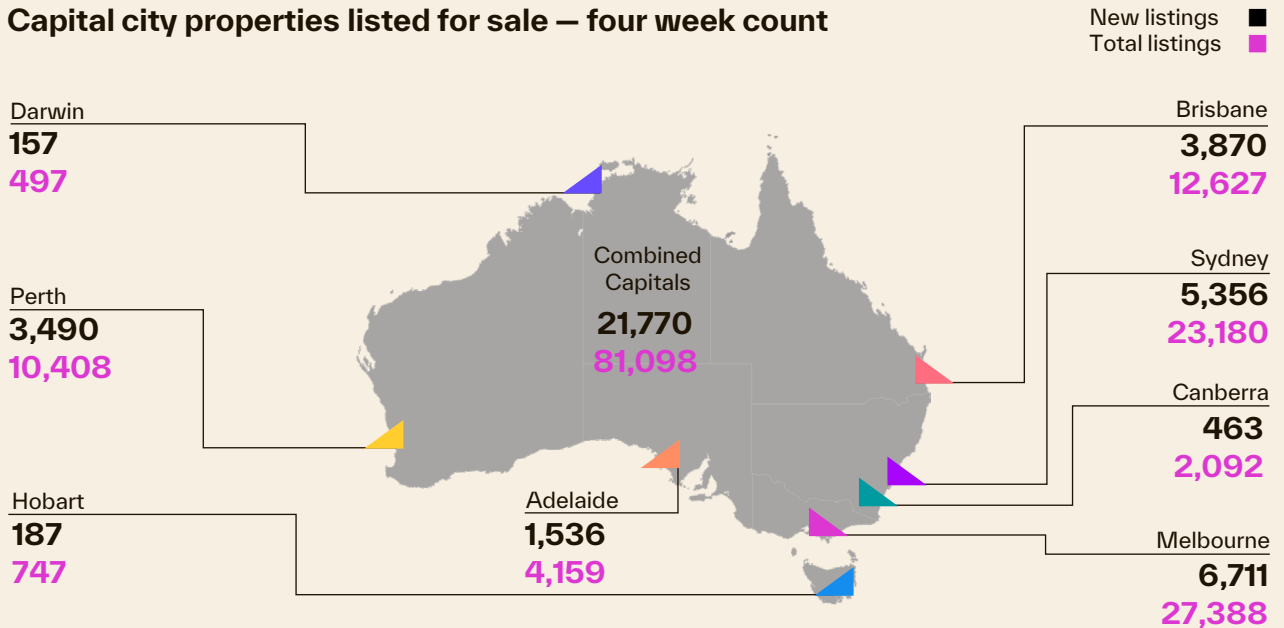


Results are based on the Cotality Daily Home Value Index. Further information and daily updates on the index results are available from <https://www.cotality.com/au/our-data/indices>.

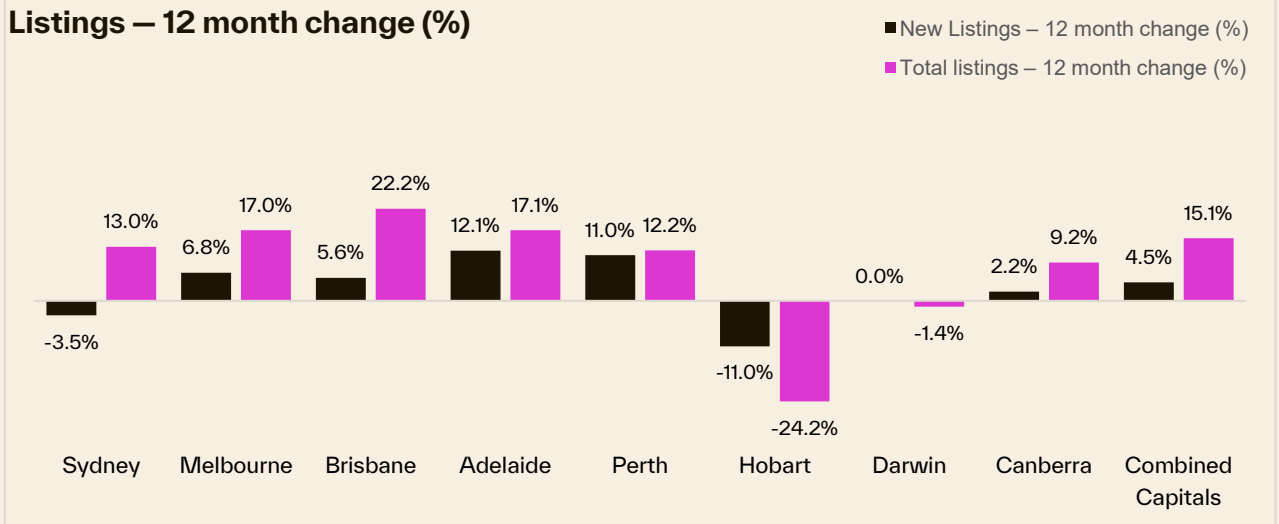
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Property Market Indicator Summary

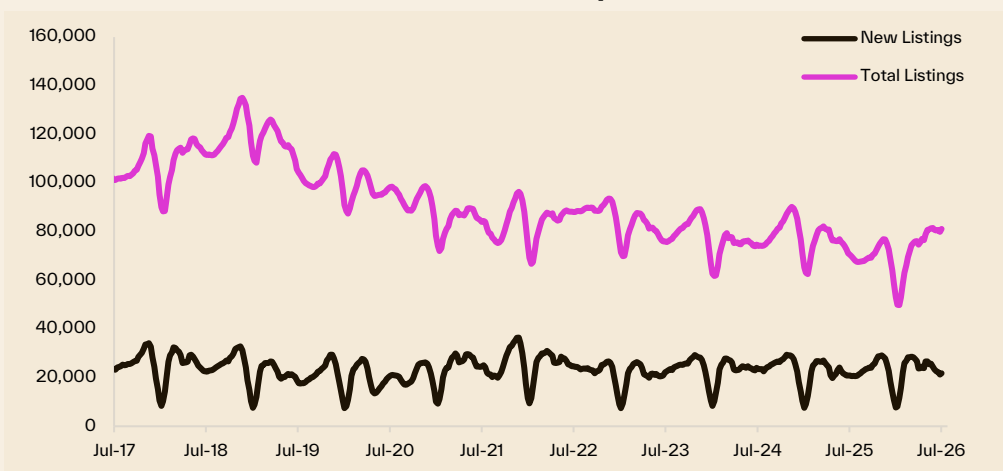
Capital city properties listed for sale – four week count



Listings – 12 month change (%)



Number of homes for sale, combined capital cities

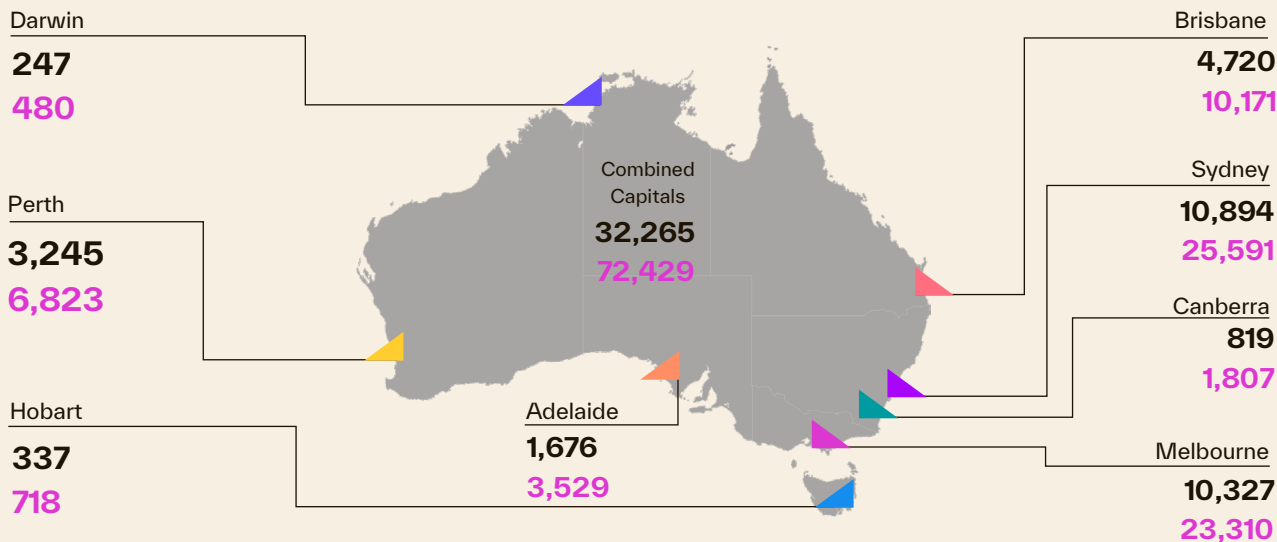


These results are calculated across properties that have been advertised for sale over the 28 days ending 05 July 2026. A new listing is one which has not been previously advertised for sale within 75 days, total listings include new listings and properties which have been previously advertised.

Property Market Indicator Summary

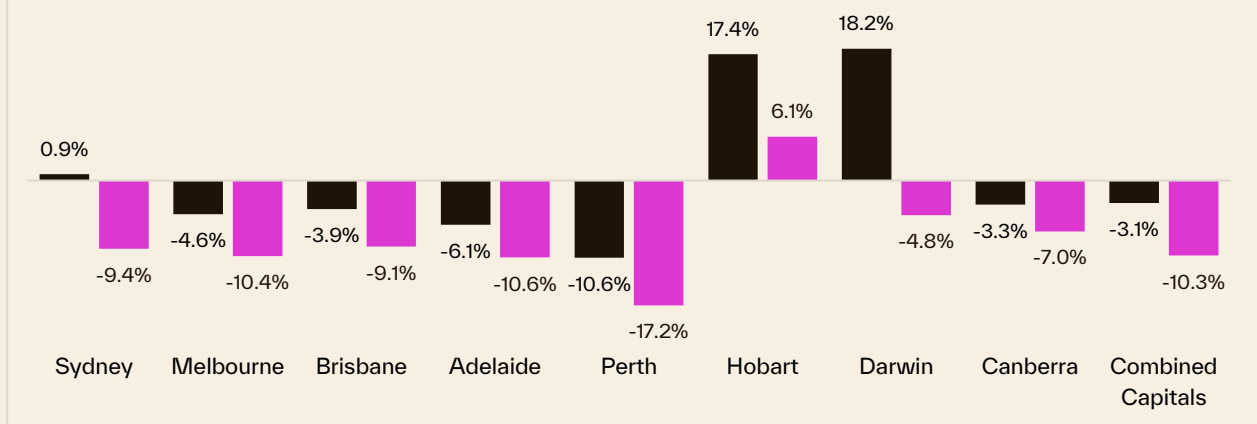
Capital city properties listed for rent – four week count

New listings ■
Total listings ■

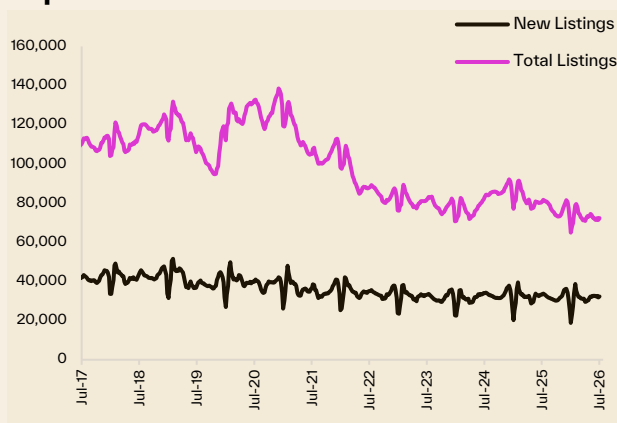


Rental listings – 12 month change (%)

■ New Listings - 12 month change (%)
■ Total listings - 12 month change (%)



Number of homes for rent, combined capital cities



Rental snapshot – data to June 2026

Region	Median rent	Change in rents (all dwellings)			Gross yields (all dwellings)		Vacancy rates (all dwellings)	
		Month	Quarter	Annual	Current months ago	12 months ago	Current	12 months ago
Sydney	\$841	0.2%	1.5%	5.9%	3.3%	3.0%	1.9%	2.0%
Melbourne	\$641	0.4%	1.4%	4.9%	3.9%	3.7%	1.3%	1.5%
Brisbane	\$734	0.4%	1.7%	6.4%	3.3%	3.6%	1.9%	1.8%
Adelaide	\$662	0.5%	1.9%	4.8%	3.5%	3.7%	1.0%	1.0%
Perth	\$784	0.6%	2.3%	7.8%	3.7%	4.3%	1.3%	1.4%
Hobart	\$632	0.9%	2.8%	8.6%	4.4%	4.4%	1.9%	1.6%
Darwin	\$725	1.5%	3.6%	10.1%	6.1%	6.6%	1.3%	1.5%
Canberra	\$706	0.5%	0.7%	3.2%	4.2%	4.1%	1.7%	1.7%
Combined capitals	\$739	0.4%	1.7%	6.0%	3.5%	3.5%	1.6%	1.7%
Combined regionals	\$619	0.3%	1.3%	5.9%	4.2%	4.4%	1.8%	1.8%
National	\$705	0.4%	1.6%	5.9%	3.7%	3.7%	1.6%	1.7%

Property Market Indicator Summary

Top two sales over the past week, states and territories

New South Wales



15 Waratah Street
North Strathfield

4 2 2

\$4,800,000

Ray White Burwood



65 Bredon Avenue
West Pennant Hills

5 5 2

\$4,500,000

Louis Carr West Pennant Hills

Victoria



17 Elm Grove
Richmond

3 2 2

\$3,586,000

Biggin Scott Richmond Pty Ltd



42 Sibyl Avenue
Frankston South

6 4 7

\$2,950,000

Aqua Real Estate

Queensland

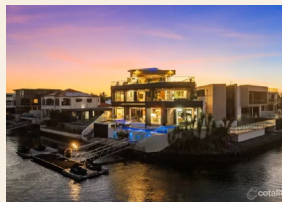


319 Monaco Street
Broadbeach Waters

5 4 3

\$10,479,000

Kollosche



20 Lakeland Key
Broadbeach Waters

5 7 7

\$9,250,000

Kollosche

South Australia



1A Brecon Street
Lockleys

4 4 2

\$2,325,000

Noakes Nickolas



36 Westmoreland Road
Grange

4 3 2

\$1,975,000

Ray White Grange

Western Australia



17 Tighe Street
Subiaco

4 3 2

\$3,100,000

Tonia McNeilly



32 Nicholls Crescent
Bull Creek

5 4 4

\$2,600,000

Ideal Realty WA

Property Market Indicator Summary

Top two sales over the past week, states and territories

Tasmania



19 Ormond Street
Bellerive

4 3 3

\$1,400,000

Harcourts Signature - Rosny Park



4 St Canice Avenue
Sandy Bay

6 2 1

\$1,215,000

Slate Estate Agents

Northern Territory

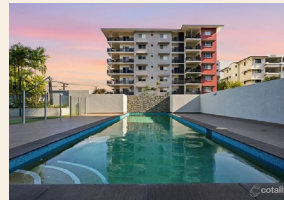


27 Coleman Street
Muirhead

4 2 2

\$930,000

Ray White Darwin



502B/2 Mauna Loa Street
Darwin City

2 2 2

\$550,000

Coles and Carter

Australian Capital Territory



29 Weston Street
Yarralumla

4 3 2

\$3,000,000

Hive Property



6 Angles Court
Nicholls

4 2 2

\$2,060,000

Town Residential

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