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Property Market Indicator Summary

All data to week ending 12th July 2026

Auction clearance rates reach a seven-week high as auction volumes decline

Auction activity declined last week, with the number of auctions falling by 8.7% to 1,318, which was also 8.0% lower than the corresponding week a year ago. The combined capitals preliminary clearance rate rose to 54.8%, the highest in seven weeks and the first time above 50% in three weeks, up from 49.8% the week before.

Across the combined capital cities, Melbourne accounted for the largest proportion of auction volume, with 585 homes brought to market. While this represented a modest 0.3% increase on the week prior, it was 6.8% below its level a year earlier. The preliminary clearance rate in Melbourne strengthened to 56.2%, up from 54.5% two weeks prior, representing the highest early result in four weeks.

Sydney saw the largest move in clearance rates, with the preliminary reading up to 57.5%. That was its highest in ten weeks and well above the 47.3% low three weeks ago. That said volumes fell sharply to 452 auctions, down 18.7% both on the week and on a year ago.

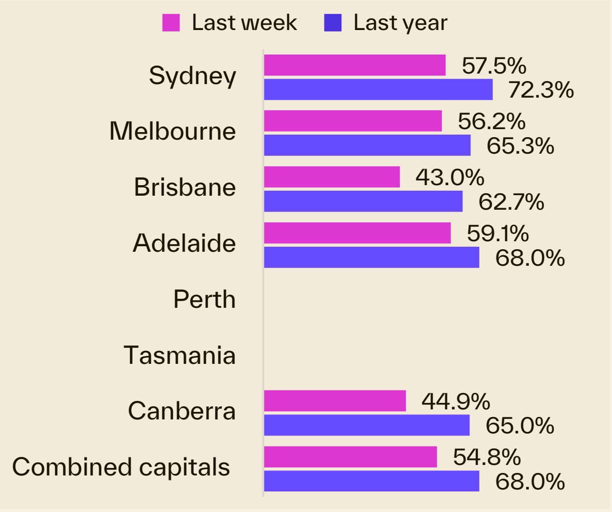
Brisbane showed the most improvement among the mid-tier markets. There were 128 auctions, up 7.6% from the previous week and 25.5% higher than a year ago. The preliminary clearance rate rose to 43.0%, up from a very weak 23.8% the week before.

Similarly, there was a sharp lift in Adelaide's preliminary clearance rate, which rose to 59.1% from 45.7% a week earlier. However, the auction volume fell 25.9% to 83.

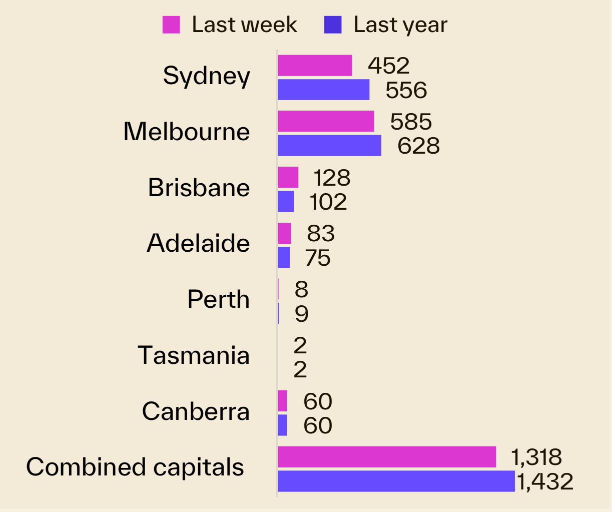
Among the smaller capitals, Canberra held 60 auctions, down 4.8% from the previous week and unchanged from the same week last year, with a preliminary clearance rate of 44.9%. Auction activity remained minimal in other regions, with eight auctions in Perth and two in Tasmania.

Capital City Auction Statistics (Preliminary)

Clearance rate



Total auctions



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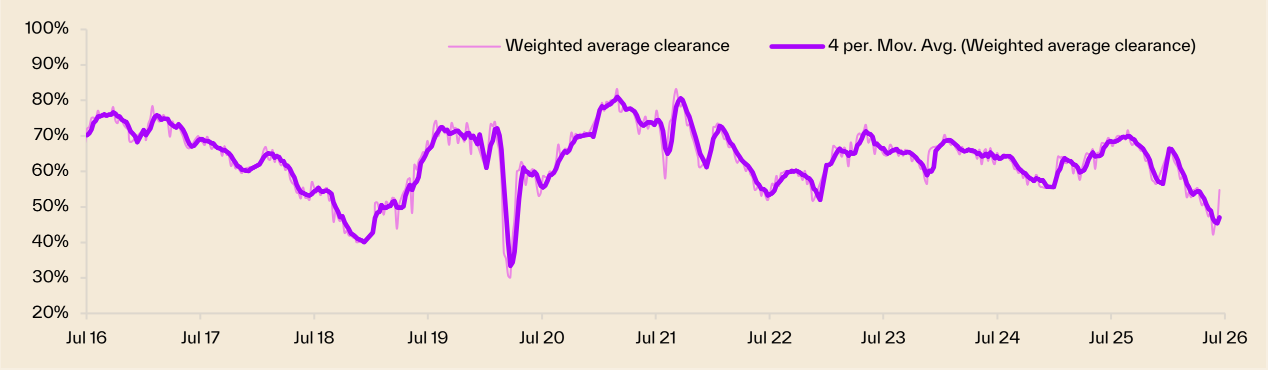
Property Market Indicator Summary

Capital City Auction Statistics (Preliminary)

City	Clearance rate	Total auctions	Cotality auction results	Cleared auctions	Uncleared auctions
Sydney	57.5%	452	334	192	142
Melbourne	56.2%	585	459	258	201
Brisbane	43.0%	128	86	37	49
Adelaide	59.1%	83	44	26	18
Perth	n.a.	8	4	1	3
Tasmania	n.a.	2	2	0	2
Canberra	44.9%	60	49	22	27
Combined capitals	**54.8%**	**1,318**	**978**	**536**	**442**

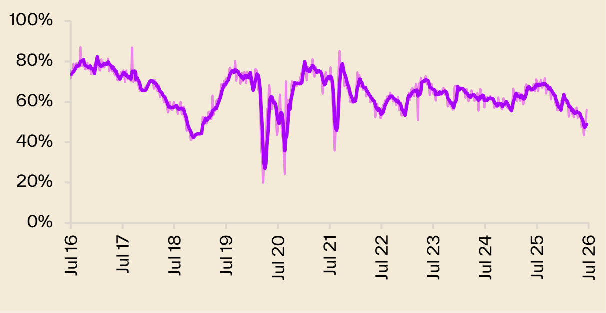
Weekly clearance rates

Combined capital cities



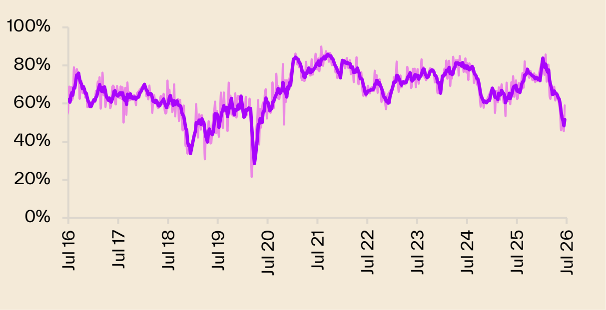
Sydney

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	n.a.	12	8	5	3
Baulkham Hills and Hawkesbury	60.0%	14	10	6	4
Blacktown	60.0%	27	10	6	4
City and Inner South	57.8%	51	45	26	19
Eastern Suburbs	60.0%	38	30	18	12
Inner South West	55.3%	46	38	21	17
Inner West	80.6%	44	36	29	7
North Sydney and Hornsby	47.9%	56	48	23	25
Northern Beaches	61.5%	36	26	16	10
Outer South West	n.a.	5	2	1	1
Outer West and Blue Mountains	n.a.	5	5	4	1
Parramatta	52.9%	31	17	9	8
Ryde	47.4%	29	19	9	10
South West	31.6%	32	19	6	13
Sutherland	63.6%	27	22	14	8
Melbourne sub-regions					
Inner	60.3%	69	58	35	23
Inner East	43.3%	37	30	13	17
Inner South	64.4%	59	45	29	16
North East	62.5%	94	72	45	27
North West	43.1%	86	72	31	41
Outer East	65.7%	45	35	23	12
South East	67.2%	81	58	39	19
West	43.6%	100	78	34	44
Mornington Peninsula	83.3%	15	12	10	2
Regional SA4					
Newcastle and Lake Macquarie	87.5%	18	16	14	2
Illawarra	n.a.	8	3	2	1
Gold Coast	33.3%	73	45	15	30
Sunshine Coast	36.8%	46	38	14	24
Geelong	n.a.	3	2	0	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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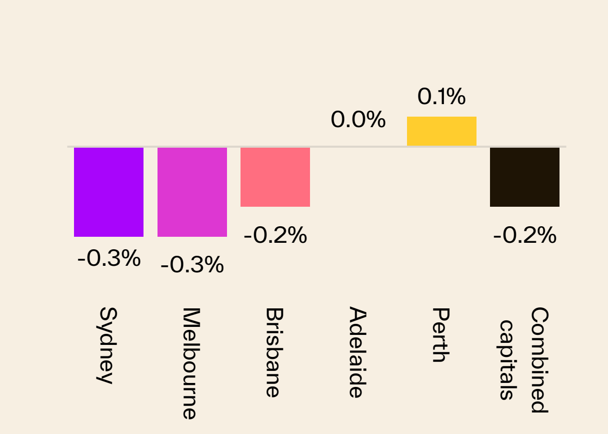
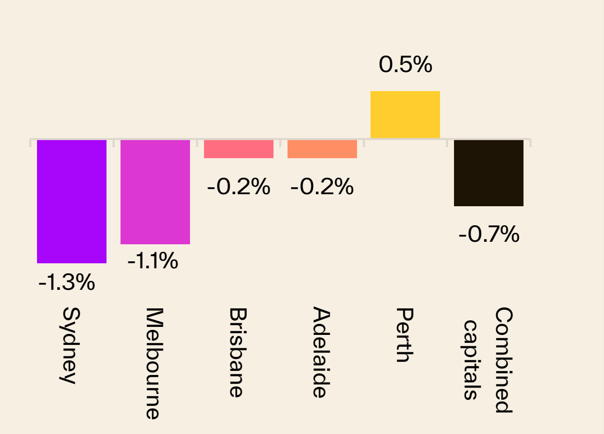
Property Market Indicator Summary

Capital city home value changes

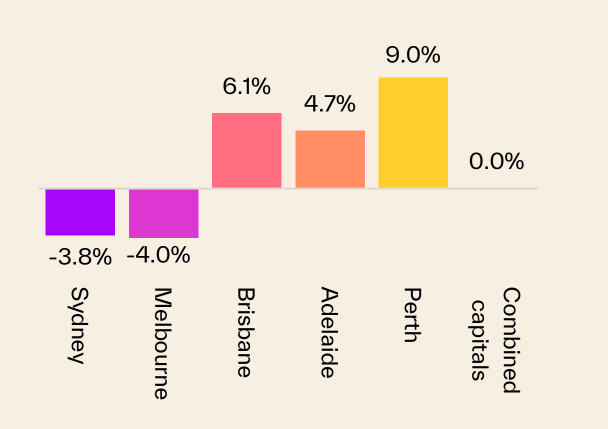
Weekly change



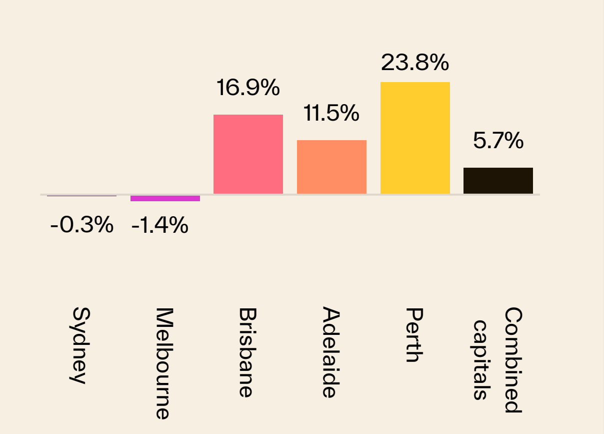
Monthly change



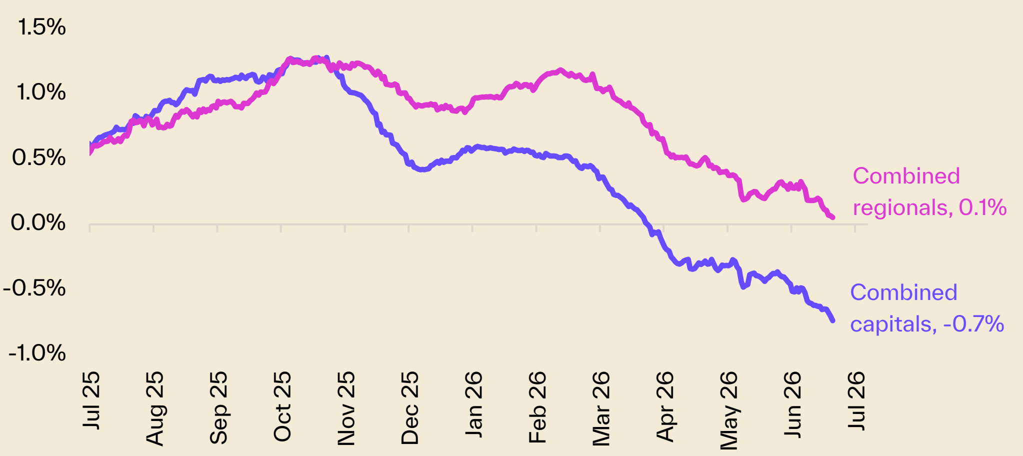
Year to date change



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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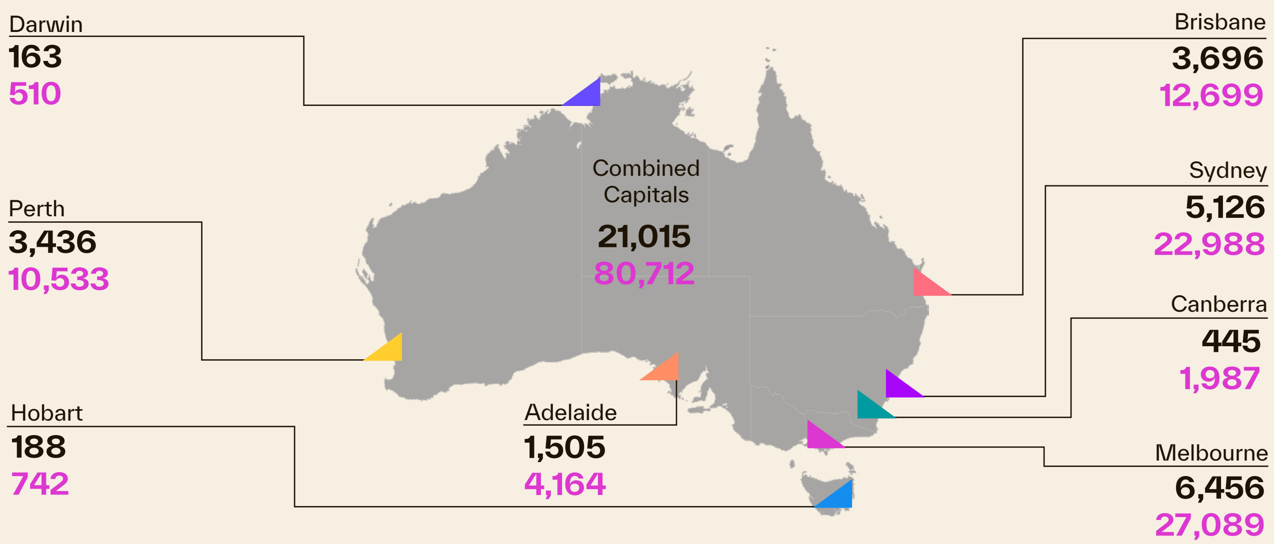
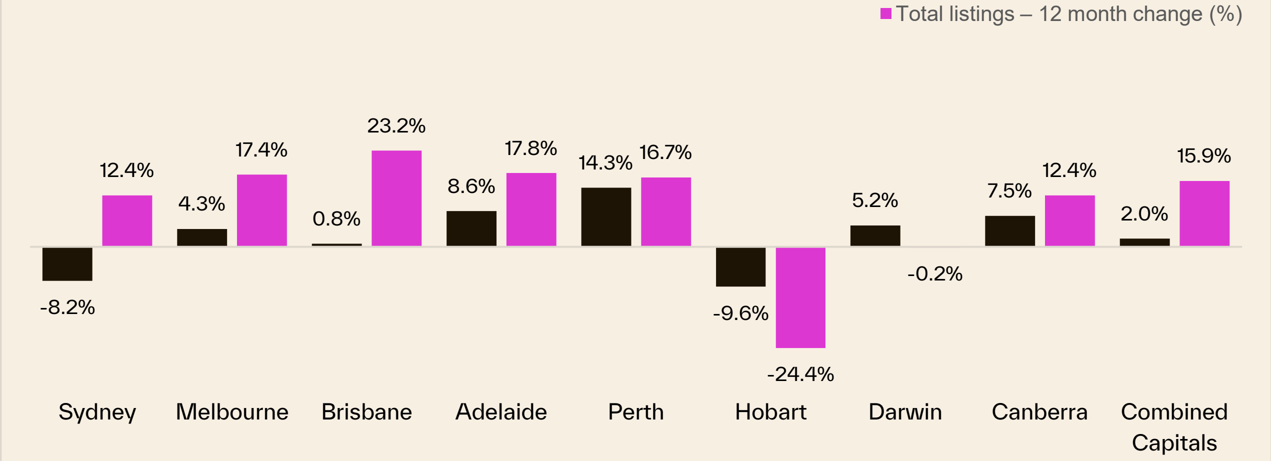
Property Market Indicator Summary

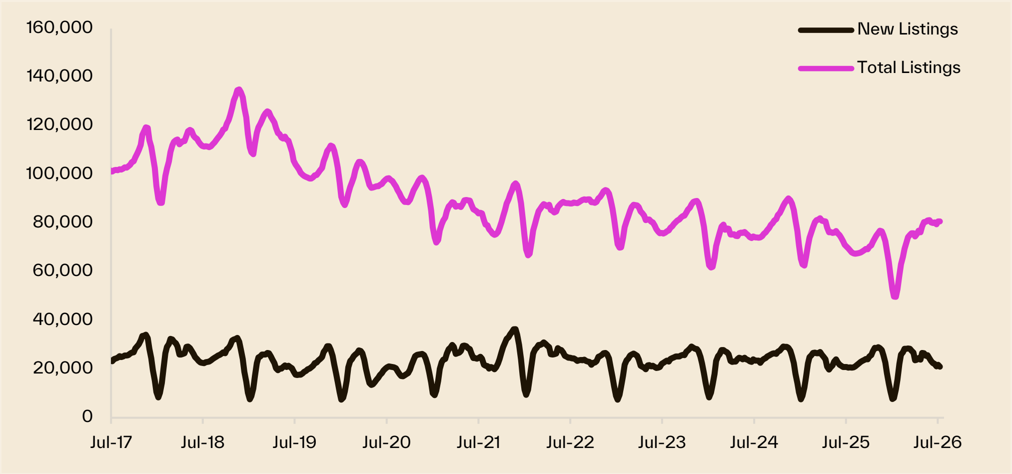
Capital city properties listed for sale — four week count



Listings — 12 month change (%)



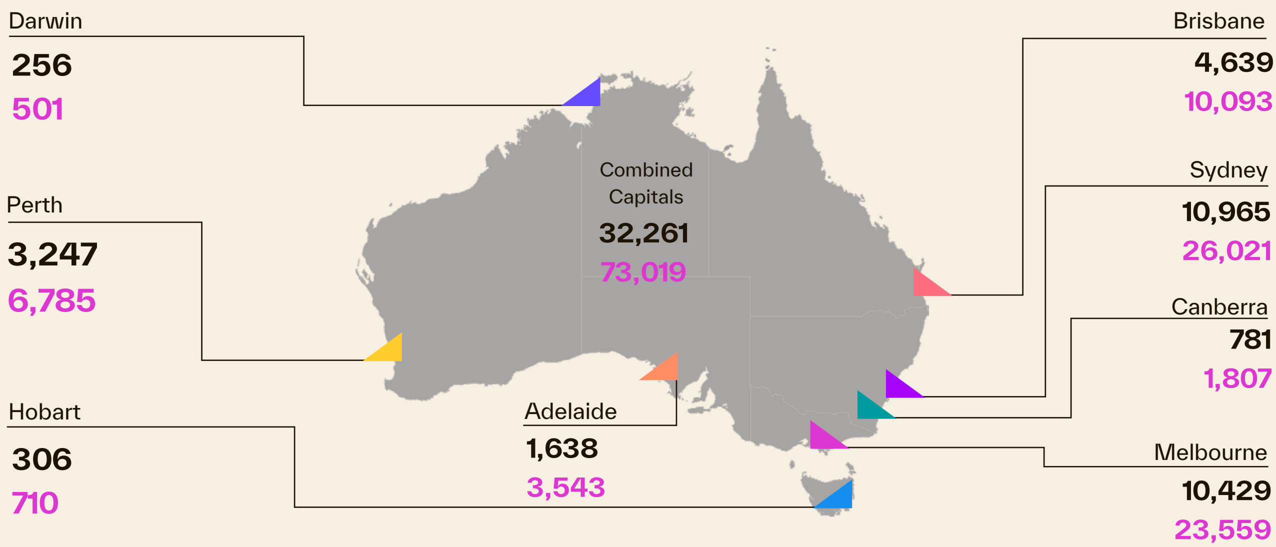
Number of homes for sale, combined capital cities



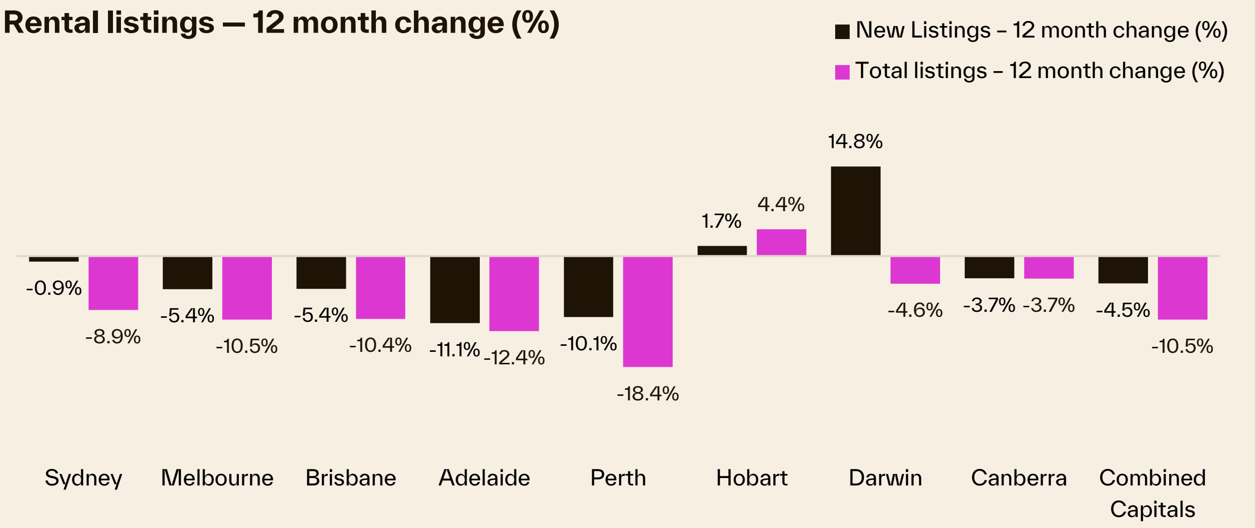
These results are calculated across properties that have been advertised for sale over the 28 days ending 12 July 2026. A new listing is one which has not been previously advertised for sale within 75 days, total listings include new listings and properties which have been previously advertised.

Property Market Indicator Summary

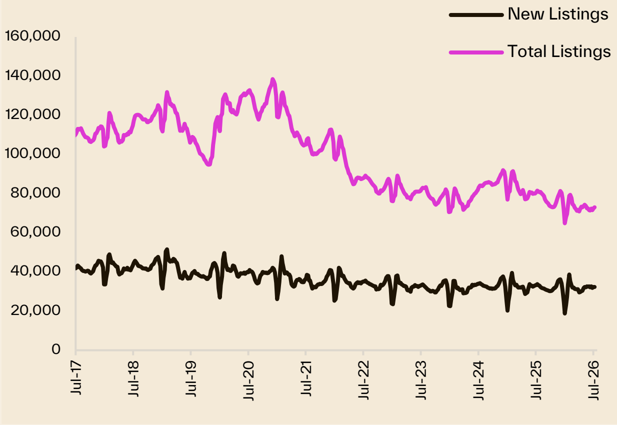
Capital city properties listed for rent — four week count



Rental listings — 12 month change (%)



Number of homes for rent, combined capital cities



Rental snapshot — data to June 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	$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

66 Warrangi Street
Turramurra

5 3 3

$7,000,000

Ray White Upper North Shore

5 Warren Ball Avenue
Newtown

4 2 2

$6,050,000

Bresic Whitney Darlinghurst

Victoria

56 William Street
Essendon

5 5 10

$4,440,000

McDonald Upton

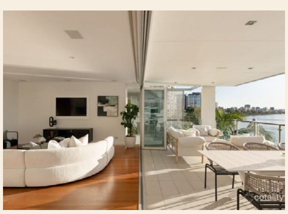
3 Winifred Court
Templestowe

4 3 4

$2,950,000

Jellis Craig Doncaster

Queensland



5/1 Glenny Street
Toowong

3 2 2

$4,700,000

Ray White New Farm

6/512 David Low Way
Castaways Beach

5 2 2

$4,300,000

McLure Prestige

South Australia

4 Penarth Avenue
Beaumont

4 3 4

$4,155,000

Toop+Toop

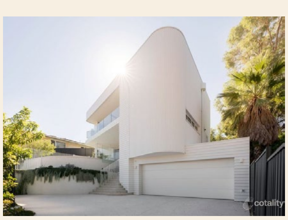
65 Cedar Avenue
South Brighton

5 3 3

$2,400,000

First National Lewis Prior

Western Australia

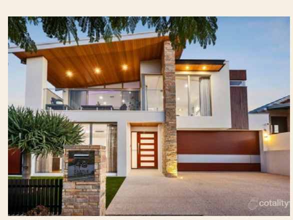


19A Frobisher Avenue
Sorrento

4 3 2

$3,600,000

Haiven Property



48 Castle Street
North Beach

5 4 2

$3,200,000

Haiven Property

Property Market Indicator Summary

Top two sales over the past week, states and territories

Tasmania

95 Cahill Place
Acton Park

4 3 8

$2,125,000

Harcourts Signature - Rosny Park

50 Spitfarm Road
Opossum Bay

3 2 1

$1,900,000

EIS Property

Northern Territory

15 Cullen Bay Crescent
arrakeyah

5 3 4

$2,480,000

Ray White Darwin

4 Oleander Street
Nightcliff

4 2 2

$1,170,000

Smith Real Estate NT

Australian Capital Territory

56 Girrahween Street
Braddon

5 2 1

$2,100,000

LJ Hooker Dickson

231/62 Constitution Avenue
Parkes

3 2 2

$2,075,000

Suburbia Real Estate

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