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Property Market Indicator Summary

All data to week ending 19th July 2026

Half of auctions sell as volumes continue to fade

The preliminary auction clearance rate declined to 50% last week, down from 54.8% the previous week. However, this outcome was stronger than the sub-50% results seen across the three weeks from June 15th to July 5th. This steadier result was partly due to a lower withdrawal rate of 20% in the preliminary data. Previously, nearly a quarter of auctions were withdrawn, which negatively impacted earlier clearance rates.

Auction volumes remained low, with 1,365 auctions last week. While this was a 4.7% increase from the previous week, it was 12.6% below the same week last year. After exceeding prior-year levels through mid-May, volumes have now trailed last year for nine consecutive weeks. Reflecting weaker market conditions, new listings are falling nationally, and fewer of these properties are being sold via auction (with vendors favouring private treaty sales instead).

Melbourne was the busiest city last week, with 599 homes up for auction, up 4.0% on the week before but 10.7% fewer than a year ago. Its early clearance rate rose slightly to 56.5% from 56.2%, the strongest preliminary result in five weeks.

Sydney held 444 auctions last week, unchanged from the previous week and 24.1% below last year. Here, the preliminary clearance rate fell sharply to 47.4%, having stayed above 50% for the prior two weeks, leaving it just above the recent low of 47.3% from the week ending June 28.

Among the mid-tier capitals, Brisbane's clearance rate remained weak. The city saw 163 auctions, up 25.4% on the previous week and 5.8% above last year, but only 35.9% sold, down from 43.0% a week earlier. That said, this was still ahead of the 23.8% clearance rate from three weeks ago.

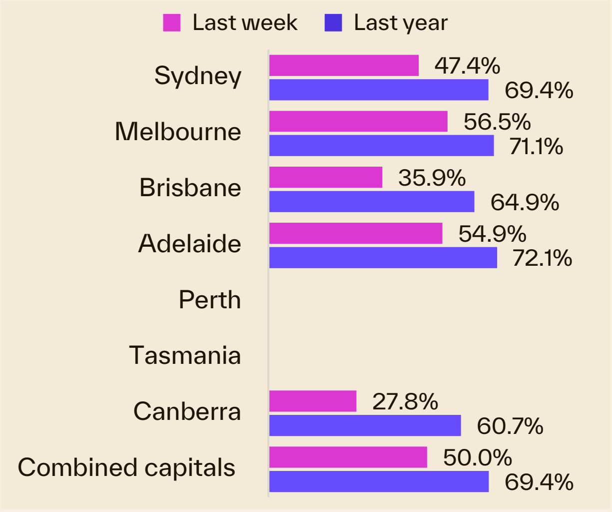
In Adelaide, 108 homes went to auction, up 28.6% on the previous week and 25.6% higher than the same week last year. Adelaide's preliminary clearance rate slipped to 54.9%, from 59.1% the week before.

Canberra held 42 auctions, down 30% from the previous week and 25% from a year ago. The preliminary clearance rate was 27.8%, its weakest early reading since March 2019.

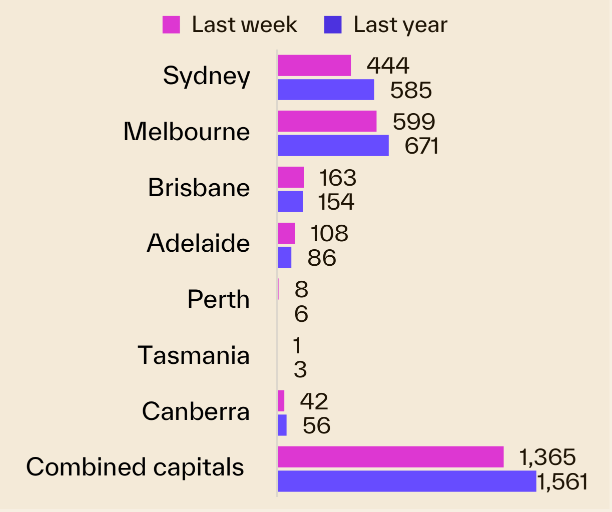
Perth held eight auctions and Tasmania had one.

Capital City Auction Statistics (Preliminary)

Clearance rate



Total auctions



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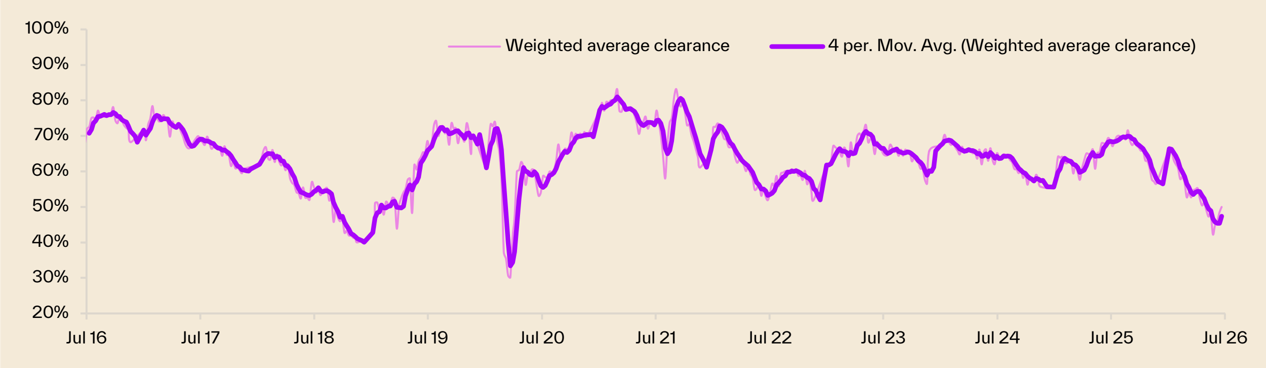
Property Market Indicator Summary

Capital City Auction Statistics (Preliminary)

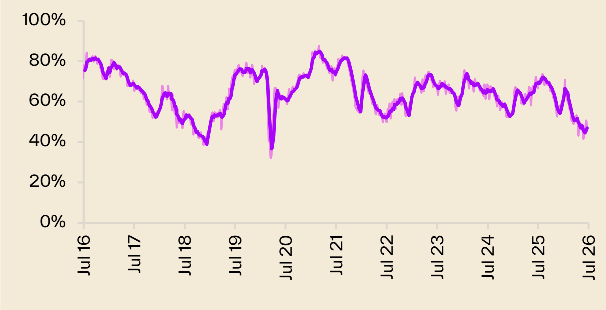
City	Clearance rate	Total auctions	Cotality auction results	Cleared auctions	Uncleared auctions
Sydney	47.4%	444	346	164	182
Melbourne	56.5%	599	460	260	200
Brisbane	35.9%	163	131	47	84
Adelaide	54.9%	108	51	28	23
Perth	n.a.	8	6	3	3
Tasmania	n.a.	1	1	0	1
Canberra	27.8%	42	36	10	26
Combined capitals	**50.0%**	**1,365**	**1,031**	**515**	**516**

Weekly clearance rates

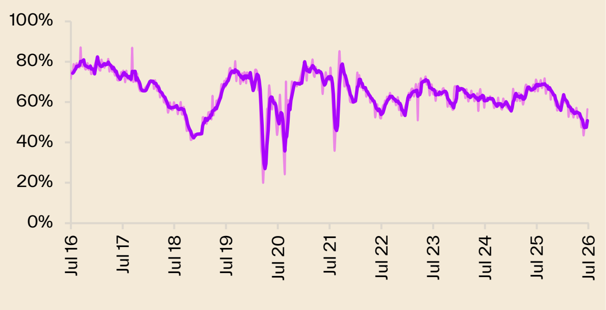
Combined capital cities



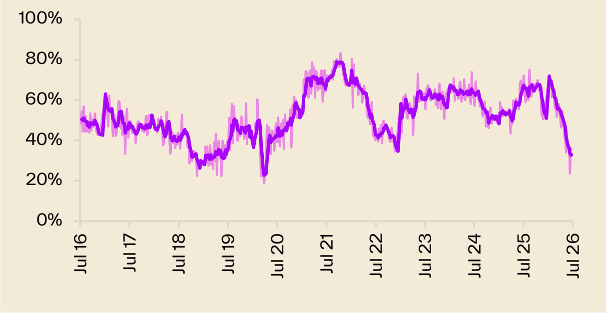
Sydney



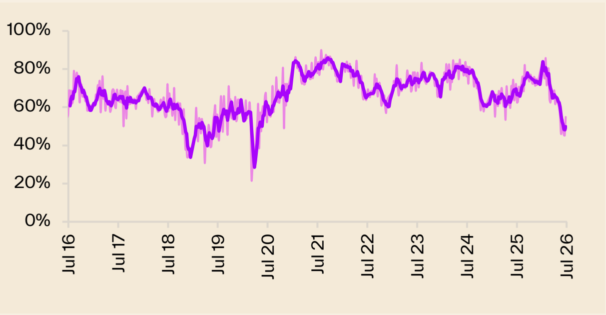
Melbourne



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.	4	4	1	3
Baulkham Hills and Hawkesbury	33.3%	21	15	5	10
Blacktown	58.3%	31	12	7	5
City and Inner South	57.9%	41	38	22	16
Eastern Suburbs	40.0%	26	25	10	15
Inner South West	62.5%	40	32	20	12
Inner West	37.3%	59	51	19	32
North Sydney and Hornsby	65.1%	55	43	28	15
Northern Beaches	48.2%	27	27	13	14
Outer South West	n.a.	4	2	0	2
Outer West and Blue Mountains	33.3%	15	15	5	10
Parramatta	22.7%	41	22	5	17
Ryde	71.4%	19	14	10	4
South West	30.4%	31	23	7	16
Sutherland	52.2%	30	23	12	11
Melbourne sub-regions					
Inner	71.2%	63	52	37	15
Inner East	53.1%	59	49	26	23
Inner South	67.4%	54	43	29	14
North East	53.8%	94	80	43	37
North West	60.6%	92	71	43	28
Outer East	46.2%	55	39	18	21
South East	51.9%	85	54	28	26
West	50.0%	85	62	31	31
Mornington Peninsula	54.6%	13	11	6	5
Regional SA4					
Newcastle and Lake Macquarie	47.4%	22	19	9	10
Illawarra	40.0%	14	10	4	6
Gold Coast	30.6%	50	36	11	25
Sunshine Coast	31.6%	25	19	6	13
Geelong	n.a.	12	6	2	4

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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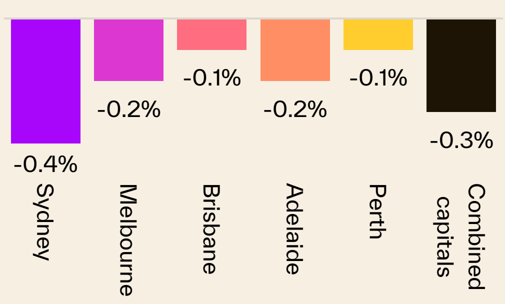
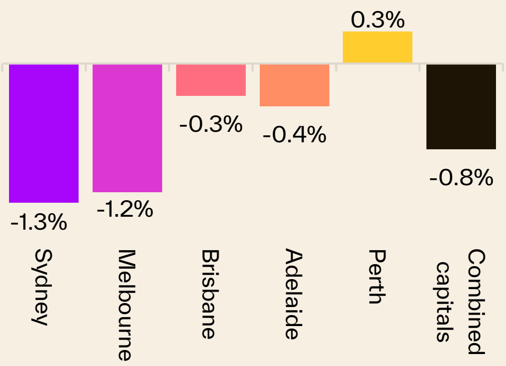
Property Market Indicator Summary

Capital city home value changes

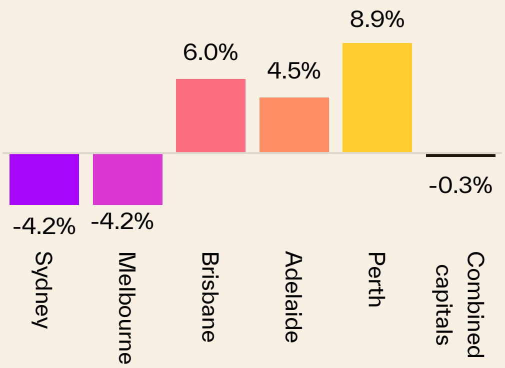
Weekly change



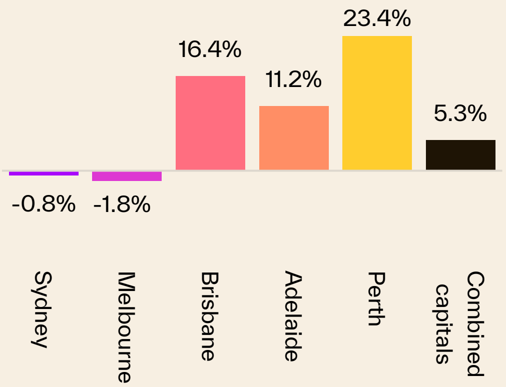
Monthly change



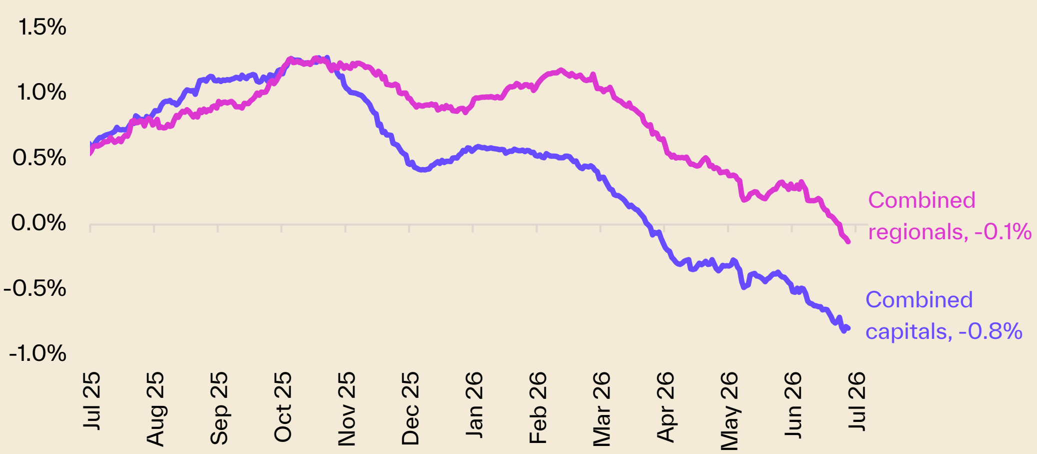
Year to date change



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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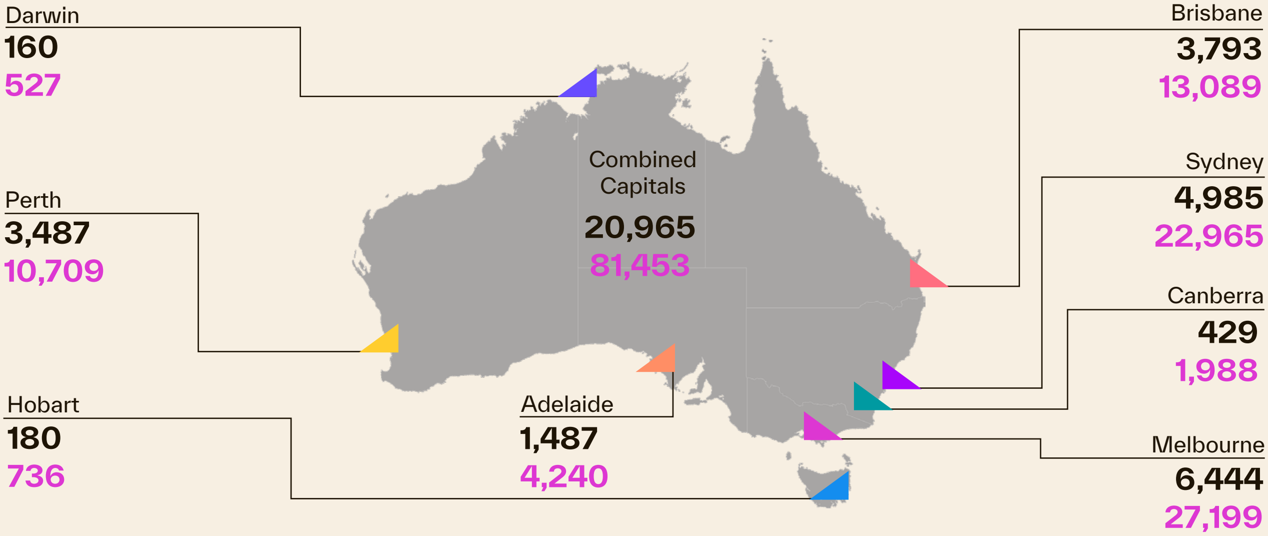
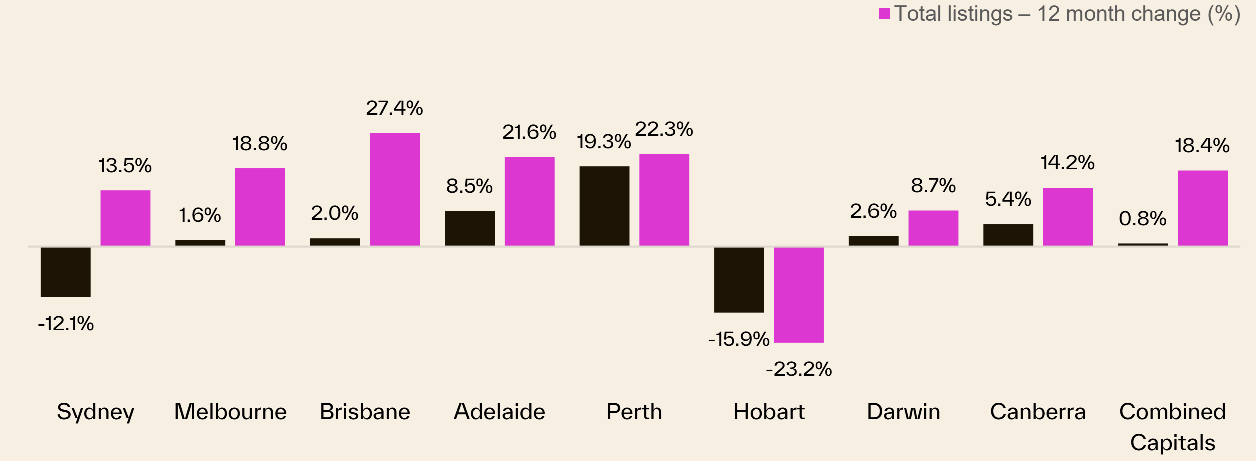
Property Market Indicator Summary

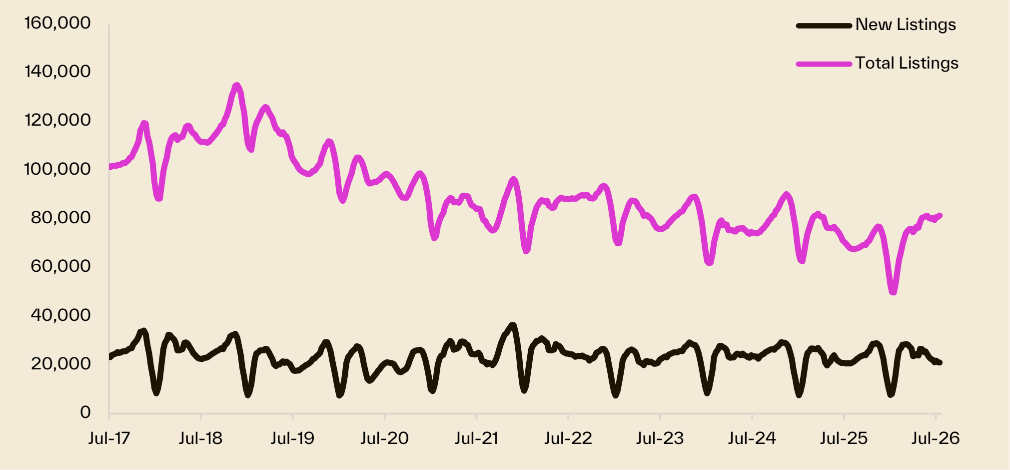
Capital city properties listed for sale — four week count



Listings — 12 month change (%)



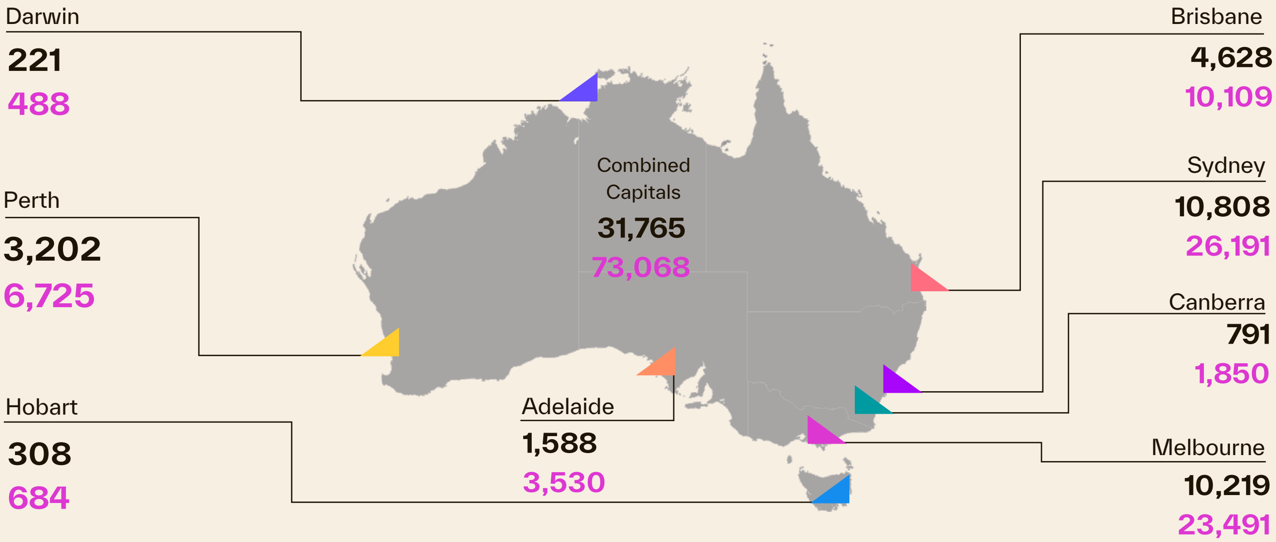
Number of homes for sale, combined capital cities



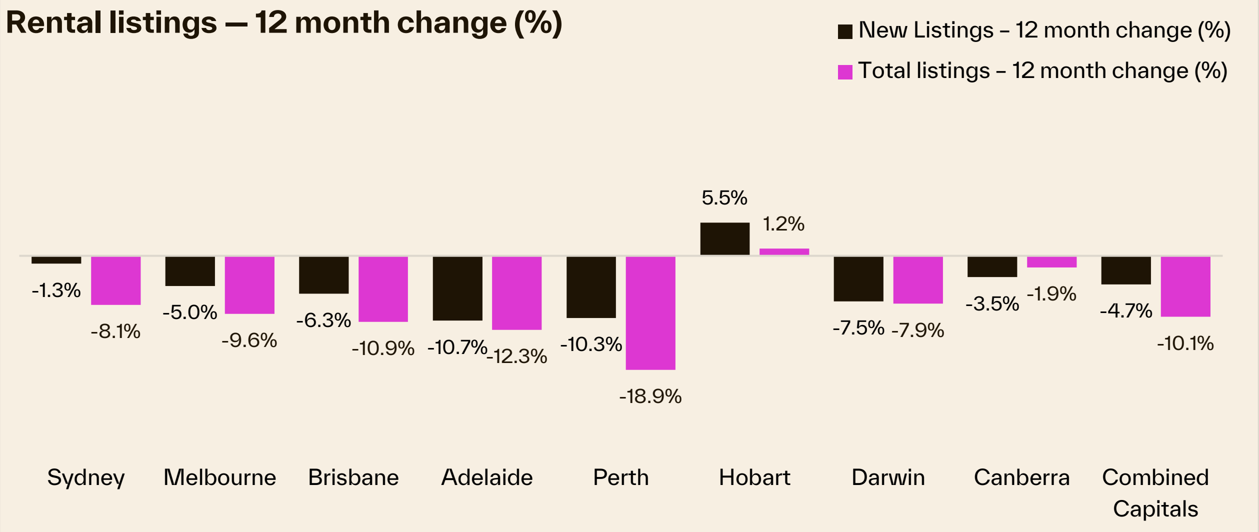
These results are calculated across properties that have been advertised for sale over the 28 days ending 19 July 2026. A new listing is one which has not been previously advertised for sale within 75 days, total listings include new listings and properties which have been previously advertised.

Property Market Indicator Summary

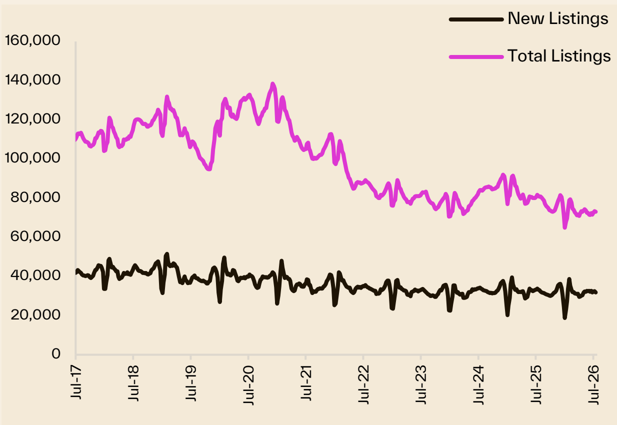
Capital city properties listed for rent — four week count



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

2 Surfside Avenue
Avalon Beach

6 bed | 4 bath | 6 car

$11,000,000

LJ Hooker Avalon Beach

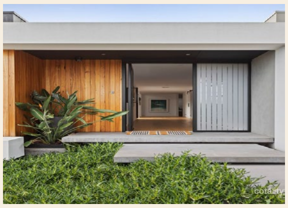
88 Albyn Road
Strathfield

5 bed | 3 bath | 2 car

$6,210,000

Belle Property Strathfield | Homebush

Victoria



29 Wimbledon Avenue
Mount Eliza

4 bed | 2 bath | 2 car

$3,000,000

Aqua Real Estate

150 Gould Street
Frankston

6 bed | 2 bath | 2 car

$2,550,000

Ray White Frankston

Queensland

16 Amaroo Drive
Buderim

5 bed | 3 bath | 3 car

$5,600,000

Town Pty Ltd

16 Culbara Street
Mooloolaba

5 bed | 3 bath | 3 car

$5,000,000

Town Pty Ltd

South Australia

27 Myall Avenue
Kensington Gardens

4 bed | 2 bath | 2 car

$2,850,000

OC

14 Willowood Drive
Golden Grove

5 bed | 2 bath | 2 car

$2,050,000

Professionals Robins 888

Western Australia

3 Hamersley Street
Cottesloe

4 bed | 2 bath | 3 car

$4,050,000

Shellabears Real Estate

43 Reserve Street
Claremont

5 bed | 3 bath | 2 car

$2,990,000

Honsun Realty

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Property Market Indicator Summary

Top two sales over the past week, states and territories

Tasmania

27 Wentworth Street
Newstead

5 3 6

$1,600,000

Howell Property Group

4 Casuarina Drive
Summerhill

6 3 2

$1,300,000

Sims For Property - Launceston

Northern Territory

243 Balanda Drive
Dundee Beach

3 1 6

$1,370,000

Coles and Carter

52 Bundey Road
Humpty Doo

4 2 6

$1,125,000

Coles and Carter

Australian Capital Territory

5 Baas Becking Street
Whitlam

4 3 2

$2,000,000

Mainstream Real Estate

77 William Wilkins Crescent
Isaacs

5 3 2

$1,737,000

Independent Property Group South

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