Property Market Indicator Summary

All data to week ending 26th July 2026

Capital city clearance rates hold in the low 50% despite a lift in auction volumes

Auction volumes have increased modestly over the past two weeks, rising by 4.0% last week following a 4.8% lift two weeks ago to reach 1,421 events. That said, these increases came off a relatively low base, and auction volumes have remained consistently below levels recorded a year ago, with volumes last week 16.9% lower than the same period in 2025.

The preliminary clearance rate has remained in the low 50% range over the past three weeks, edging up to 52.4% last week. This was an increase of 2.4 percentage points from the previous week's 50.0% and 5.0 points above the recent low of 47.4% for the week ending June 21.

An improvement in the withdrawal rate helps explain the lift in clearance rates. Withdrawn auctions had risen to 24% of all scheduled auctions over the week ending June 21 but reduced back to 17.4% last week. The withdrawal rate remained elevated relative to 2025, when on average 11.8% of auctions were being withdrawn.

Melbourne held 707 auctions last week, up 18% from the previous week but 10.1% lower than the same week last year. The preliminary clearance rate declined by 1.9 percentage points to 54.6%. After reaching a low of 50.2% for the week ending June 28, the rate has remained in the mid-50% range over the past four weeks.

433 auctions were held in Sydney last week, a 2.3% week-on-week reduction and 27.5% lower than at the same time last year. The preliminary clearance rate rose to 56.1%, a solid bounce from the 47.4% recorded the previous week. That rise came despite 29.8% of scheduled auctions being withdrawn from the market. Of the successful Sydney auctions, 63.4% sold before the property went under the hammer.

In Brisbane, 134 homes were auctioned last week, representing an 18.3% decrease from the previous week and a 28.3% decline compared with the same period last year. The preliminary clearance rate fell to 30.5%, a decrease of 5.4 percentage points and the second lowest preliminary result recorded this year.

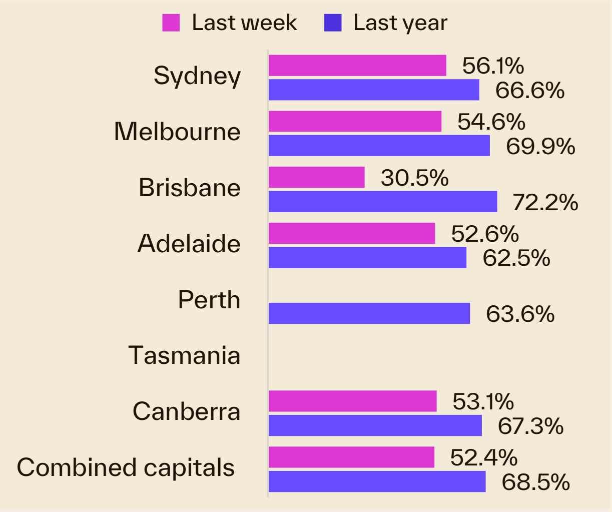
Adelaide was one of the few markets busier than a year ago, with its 99 auctions almost 24% above the same time in 2025, though down 10% on the previous week. The preliminary clearance rate dipped to 52.6%, down 2.3 percentage points and the third lowest preliminary result so far this year.

At 53.1%, the ACT reported its strongest preliminary rate in nine weeks. The territory held 38 auctions last week, 9.5% fewer than the previous week and 22% fewer than the same time last year. Perth held 10 auctions last week, with only 25% reporting a positive result, and no auctions were held in Tasmania.

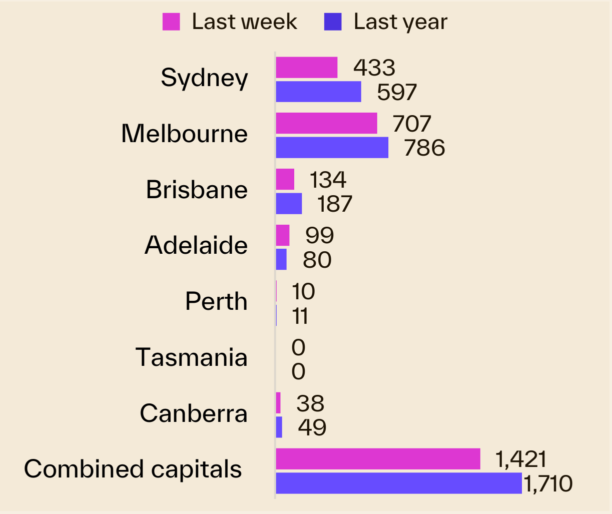
The number of auctions is expected to increase this week, with approximately 1,570 homes currently scheduled for auction.

Capital City Auction Statistics (Preliminary)

Clearance rate



Total auctions



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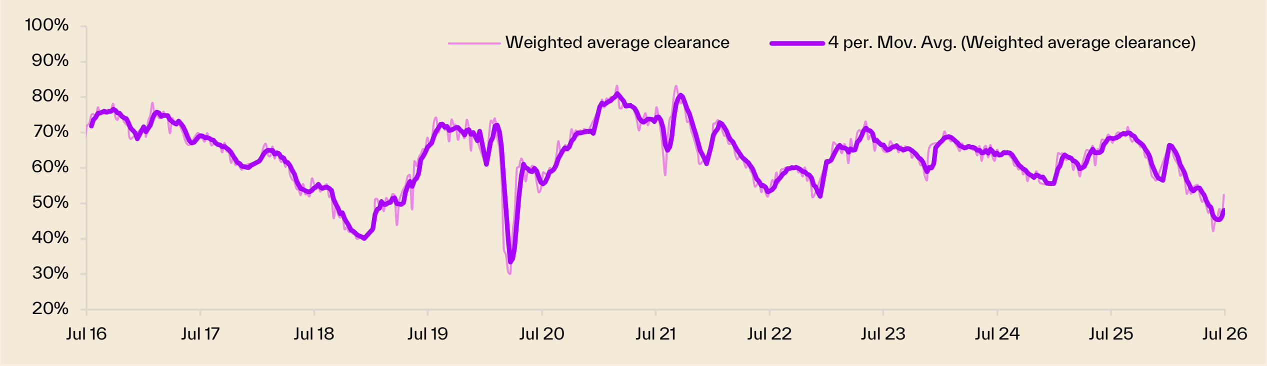
Property Market Indicator Summary

Capital City Auction Statistics (Preliminary)

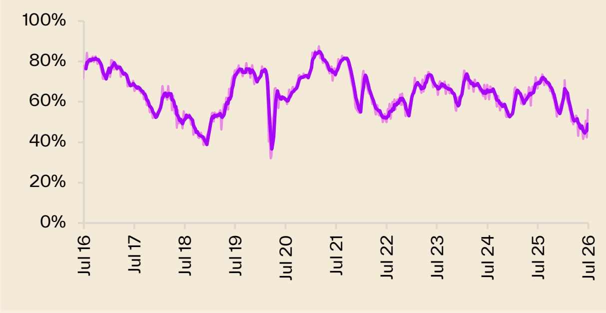
City	Clearance rate	Total auctions	Cotality auction results	Cleared auctions	Uncleared auctions
Sydney	56.1%	433	326	183	143
Melbourne	54.6%	707	571	312	259
Brisbane	30.5%	134	105	32	73
Adelaide	52.6%	99	57	30	27
Perth	n.a.	10	8	2	6
Tasmania	n.a.	0	0	0	0
Canberra	53.1%	38	32	17	15
Combined capitals	**52.4%**	**1,421**	**1,099**	**576**	**523**

Weekly clearance rates

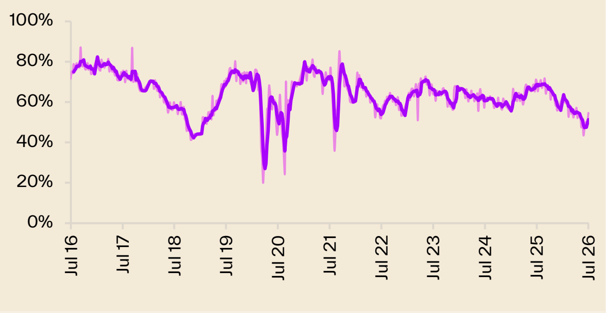
Combined capital cities



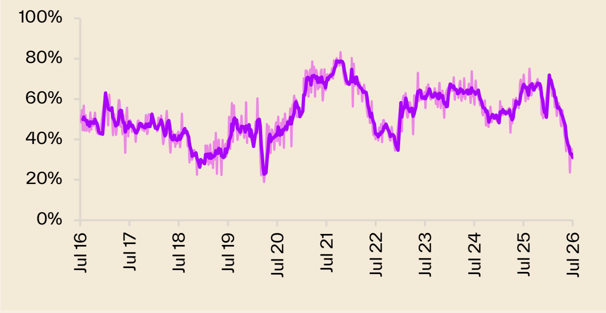
Sydney



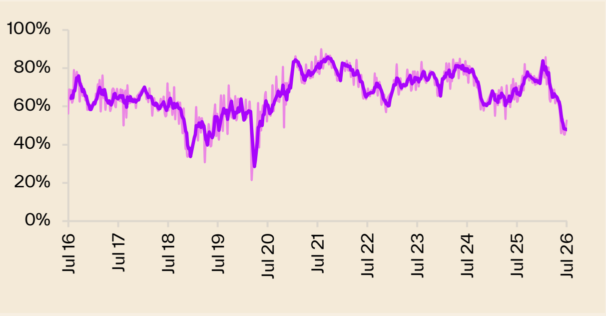
Melbourne



Brisbane



Adelaide



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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.	2	2	0	2
Baulkham Hills and Hawkesbury	38.5%	25	13	5	8
Blacktown	52.9%	30	17	9	8
City and Inner South	63.6%	45	44	28	16
Eastern Suburbs	42.1%	21	19	8	11
Inner South West	59.6%	57	47	28	19
Inner West	71.4%	35	28	20	8
North Sydney and Hornsby	72.9%	65	48	35	13
Northern Beaches	40.9%	27	22	9	13
Outer South West	n.a.	6	5	4	1
Outer West and Blue Mountains	n.a.	7	6	2	4
Parramatta	52.2%	39	23	12	11
Ryde	54.6%	30	22	12	10
South West	31.3%	25	16	5	11
Sutherland	46.7%	20	15	7	8
Melbourne sub-regions					
Inner	59.5%	81	74	44	30
Inner East	56.9%	61	51	29	22
Inner South	52.7%	70	55	29	26
North East	70.4%	86	71	50	21
North West	59.1%	105	88	52	36
Outer East	54.4%	61	46	25	21
South East	54.0%	102	76	41	35
West	37.9%	123	95	36	59
Mornington Peninsula	35.7%	17	14	5	9
Regional SA4					
Newcastle and Lake Macquarie	54.6%	14	11	6	5
Illawarra	50.0%	13	10	5	5
Gold Coast	31.9%	52	47	15	32
Sunshine Coast	42.9%	17	14	6	8
Geelong	n.a.	9	6	4	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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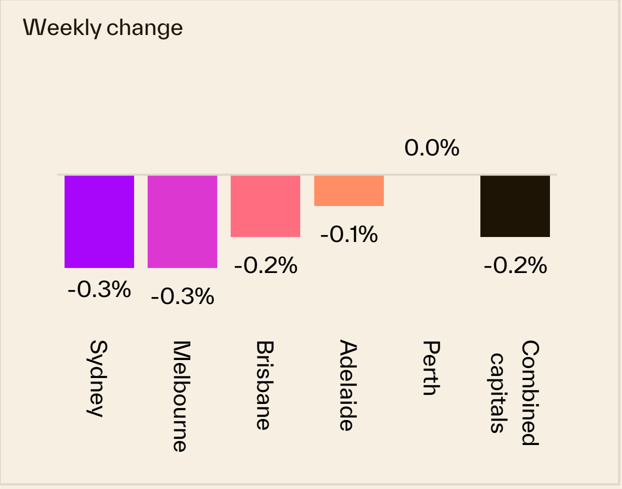
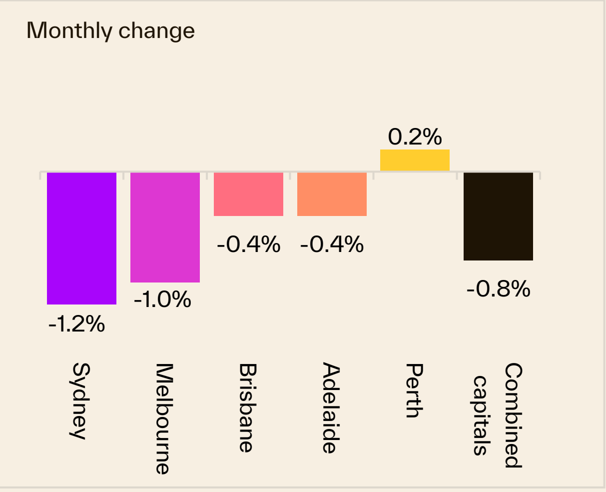
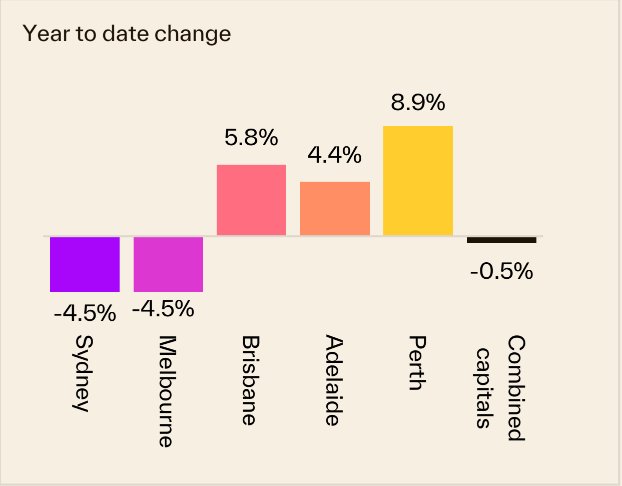
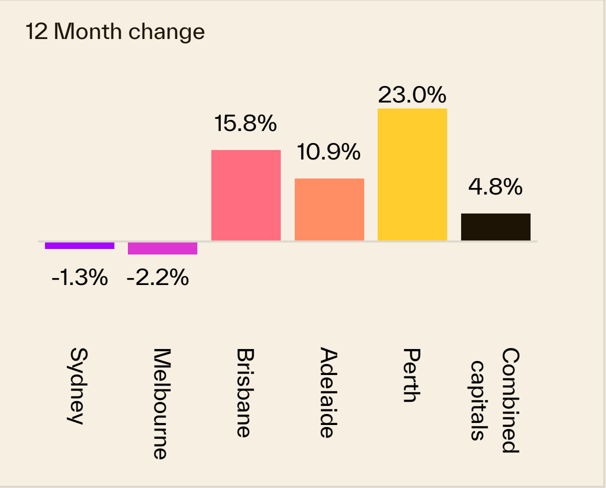
Property Market Indicator Summary

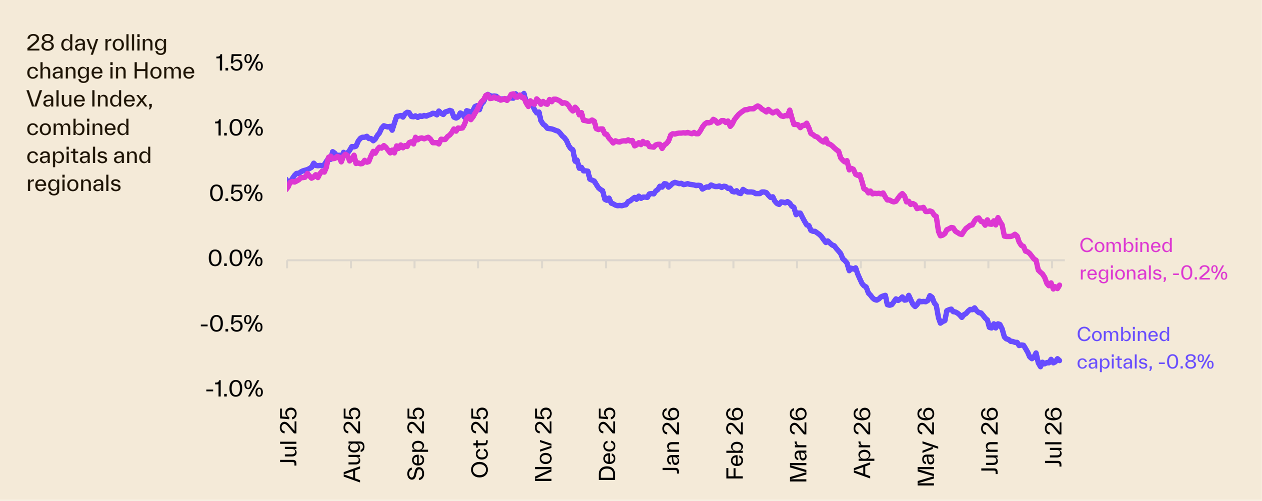
Capital city home value changes











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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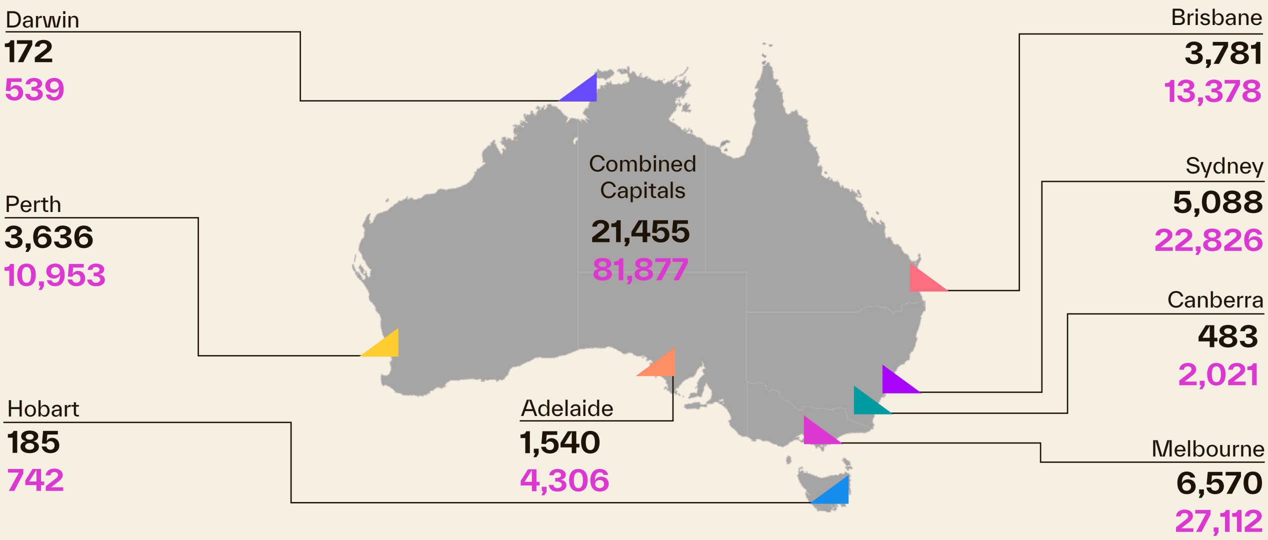
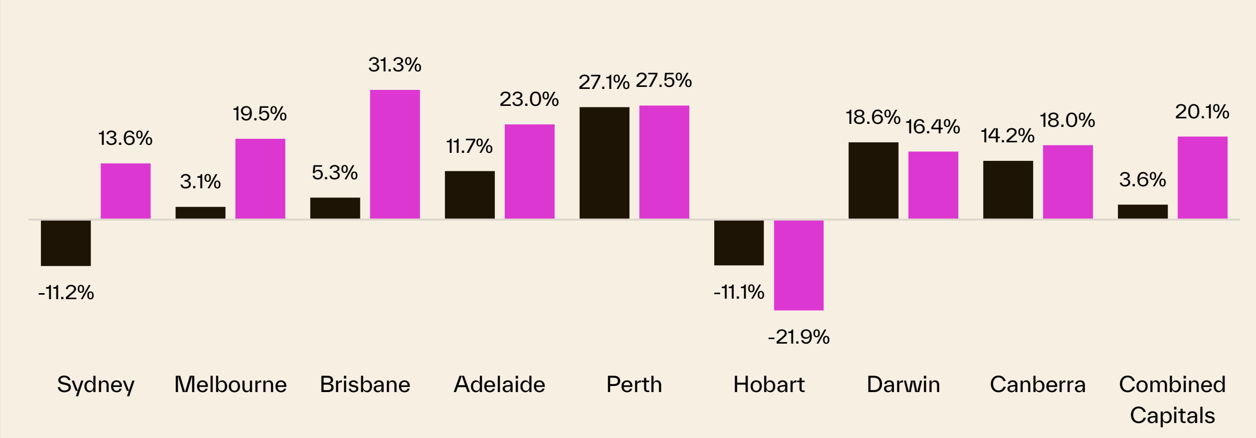
Property Market Indicator Summary

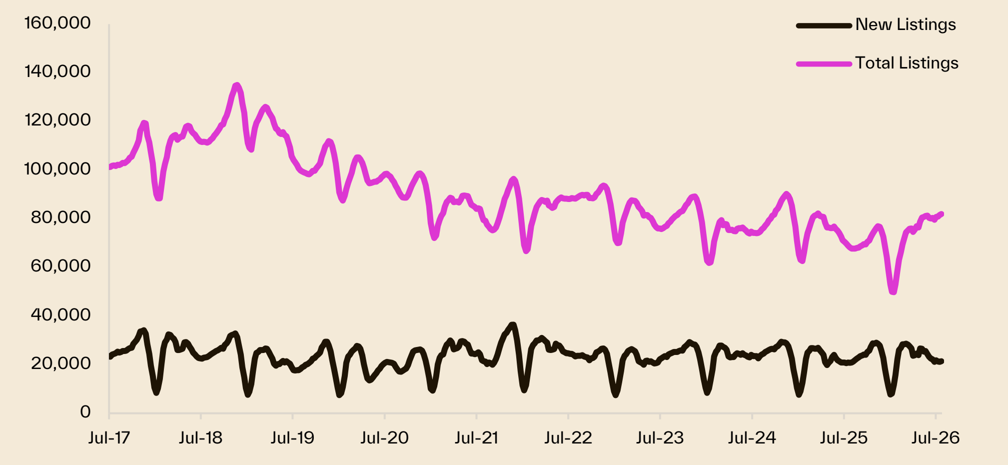
Capital city properties listed for sale — four week count



Listings — 12 month change (%)



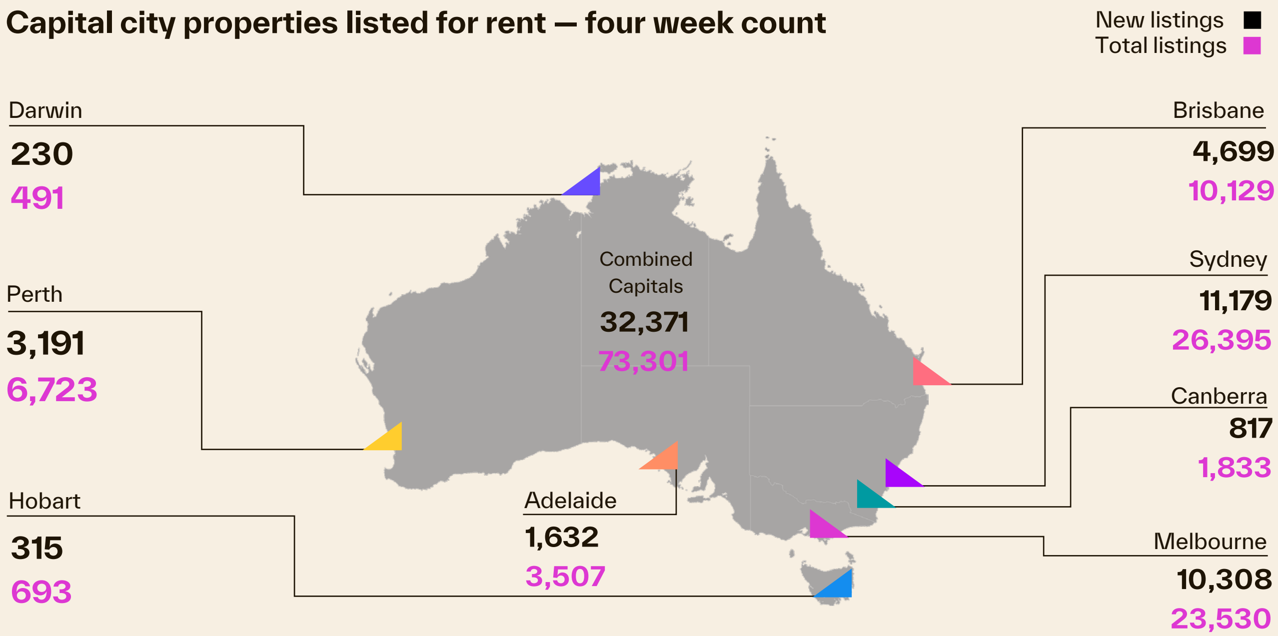
Number of homes for sale, combined capital cities



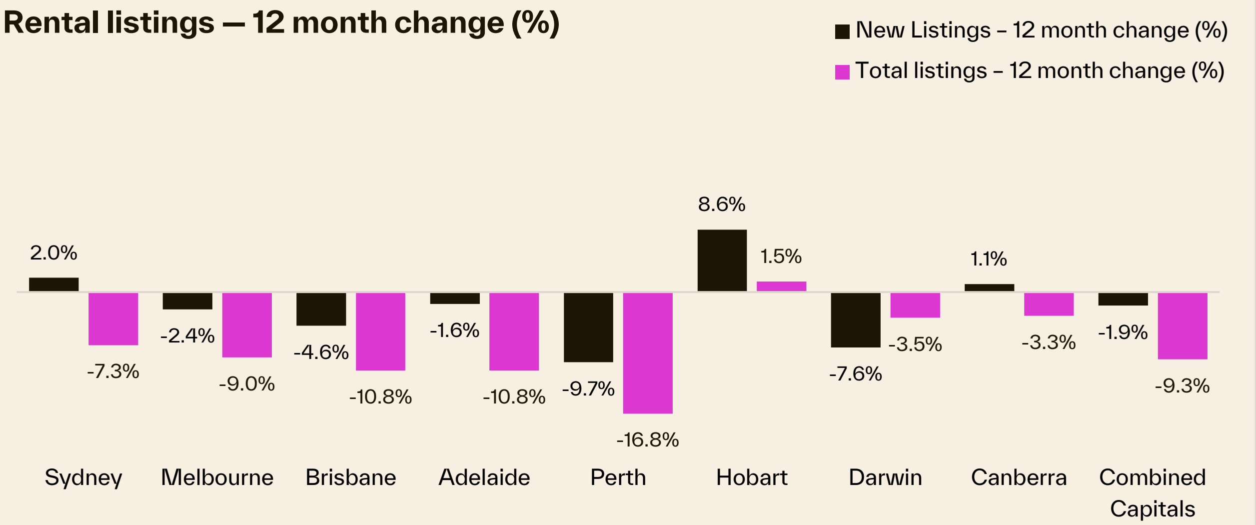
These results are calculated across properties that have been advertised for sale over the 28 days ending 26 July 2026. A new listing is one which has not been previously advertised for sale within 75 days, total listings include new listings and properties which have been previously advertised.

Property Market Indicator Summary

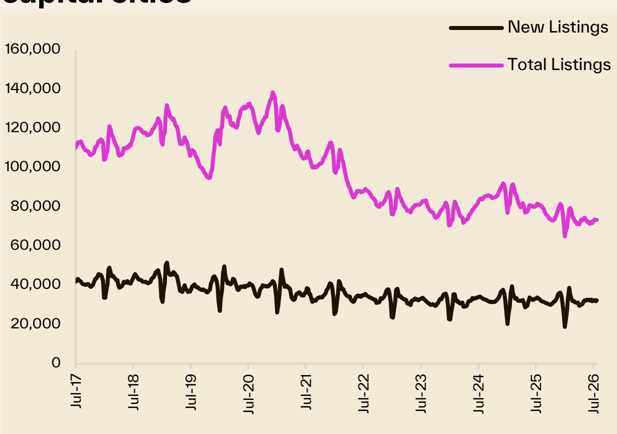
Capital city properties listed for rent — four week count



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%**

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Property Market Indicator Summary

Top two sales over the past week, states and territories

New South Wales

30A Beatty Street
Balgowlah Heights

6 bed · 5 bath · 2 car

$17,500,000

Clarke and Humel

5 Botanic Road
Mosman

4 bed · 3 bath · 2 car

$8,700,000

Simeon Partners

Victoria

97 Locksley Road
Ivanhoe

4 bed · 2 bath · 6 car

$2,950,000

Miles Real Estate Ivanhoe & Rosanna

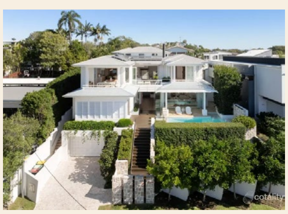
18 Spinnaker Rise
Sanctuary Lakes

4 bed · 3 bath · 2 car

$2,800,000

.Established Property

Queensland



30 Mary Street
Alexandra Headland

4 bed · 4 bath · 4 car

$6,800,000

Town Pty Ltd

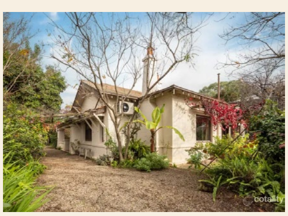
31 Kingfisher Crescent
Burleigh Waters

4 bed · 3 bath · 2 car

$4,550,000

Realty Blue - Burleigh Heads

South Australia

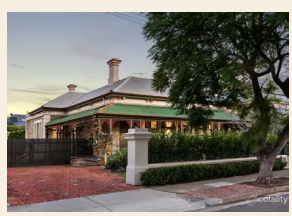


20 Glen Avenue
Unley Park

3 bed · 1 bath · 1 car

$2,130,000

Ray White Unley



34 Dudley Street
Semaphore

4 bed · 2 bath · 2 car

$2,000,000

Ray White Semaphore

Western Australia

23 Devon Road
Bassendean

5 bed · 2 bath · 2 car

$2,400,000

Jones & Co Property

4 Verona Street
Stirling

5 bed · 3 bath · 2 car

$2,225,000

Ray White North Quays

Property Market Indicator Summary

Top two sales over the past week, states and territories

Tasmania

25 Wentworth Street
Newstead

4 2 7

$1,350,000

Howell Property Group

65 Cross Street
New Town

4 2 1

$1,320,000

EIS Property

Northern Territory

59 Lakes Crescent
Marrara

4 2 2

$1,550,000

Raine & Horne Darwin

20 Ah Mat Street
Woolner

4 2 2

$865,000

Ray White Darwin

Australian Capital Territory

5 Bega Place
Narrabundah

4 3 2

$1,658,000

Hive Property

28 Gellert Street
Wright

4 3 2

$1,600,000

MARQ Property

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