

# Property Market Indicator Summary

All data to week ending 4<sup>th</sup> October 2026

## Combined capitals clearance rate falls to 48.2%, the lowest since June

The combined capitals' preliminary clearance rate fell further last week to 48.2%. This was the lowest result since the week ending June 21st (47.4%) and the second-lowest preliminary clearance rate so far this year. Last week's cash rate increase likely contributed to the weaker result, as prospective buyers faced reduced borrowing capacity and subdued confidence.

Lower clearance rates in Brisbane, Adelaide and Canberra brought the combined result down. Brisbane's preliminary clearance rate was 25.6%, Adelaide's 41.5%, and Canberra's 41.7%. In Sydney and Melbourne, preliminary clearance rates were above 50%, at 55.7% and 50.6%, respectively.

Auction volumes in Melbourne rose 136% to 670, after the Grand Final long weekend kept numbers low the previous week. Compared with a year ago, they were 42.4% lower. The preliminary clearance rate was 50.6%, up 1.9 percentage points on Grand Final week. Over the first five weeks of spring, it averaged 55.4%, matching the winter average.

More than half of Sydney's auctions were successful, with the preliminary clearance rate rising 2.1 percentage points to 55.7%. The long weekend reduced auction volumes to 304,

a fall of 61% from the week before. Auction volumes were also 40.5% below the level of a year earlier.

A decline of 16.9 percentage points left Brisbane's preliminary clearance rate at 25.6%. This was the third time this year that it has fallen within the 20% range. Auction volumes were largely unaffected by the long weekend, with 139 auctions held compared with 140 in the previous week. Against the corresponding week last year, the number of auctions was 6.1% lower.

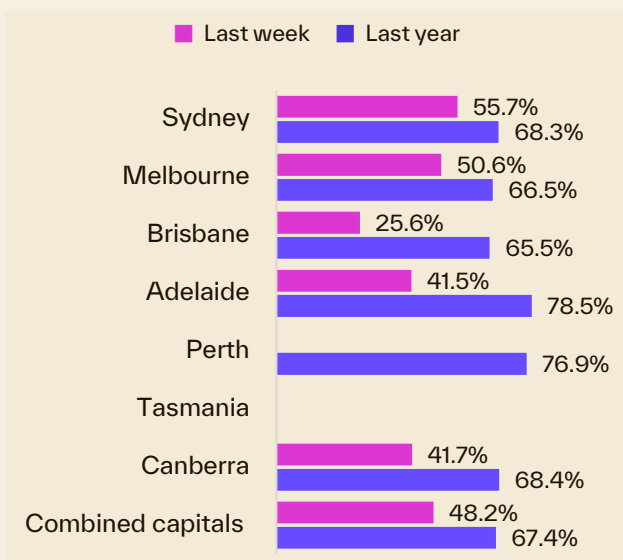
Adelaide held 69 auctions, 32% fewer than the previous week but 6.2% more than the same week last year. Its preliminary clearance rate of 41.5% was the fourth-lowest result this year and below the spring average to date of 45.8%.

The largest annual fall in auction volumes of any capital was in Canberra, where the 31 auctions held were 46% fewer than the same week last year. The preliminary clearance rate dropped 12.2 percentage points to 41.7%, which put it 5.6 percentage points below the spring average to date of 47.3%. Auction volumes also fell 62% from the previous week.

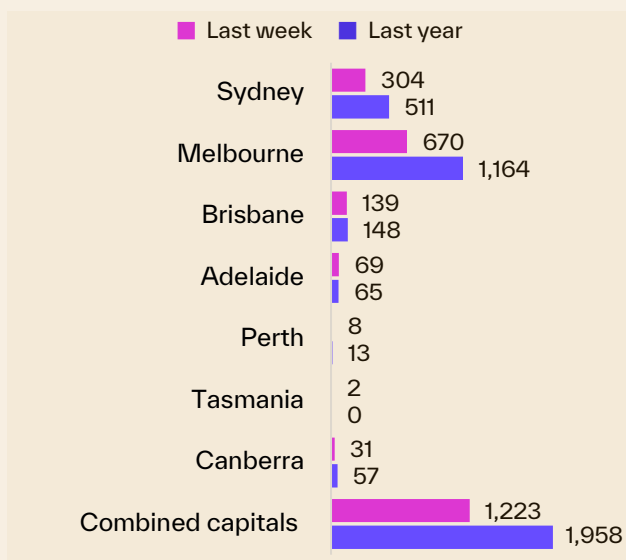
There were eight auctions in Perth and two in Tasmania.

## Capital City Auction Statistics (Preliminary)

Clearance rate



Total auctions



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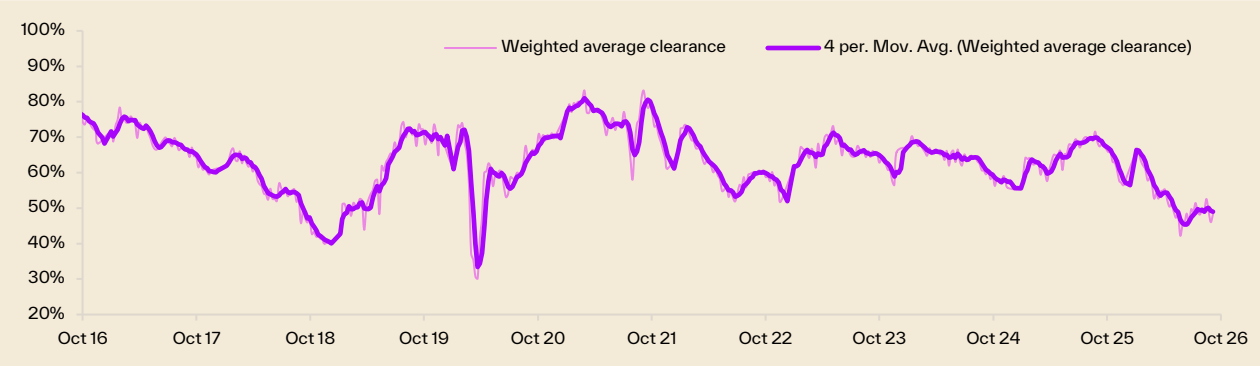
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## Capital City Auction Statistics (Preliminary)

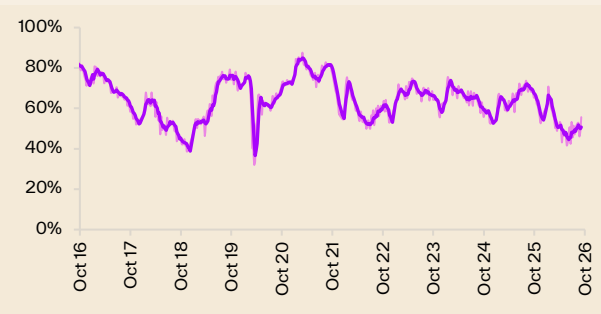
| City              | Clearance rate | Total auctions | Cotality auction results | Cleared auctions | Uncleared auctions |
|-------------------|----------------|----------------|--------------------------|------------------|--------------------|
| Sydney            | 55.7%          | 304            | 230                      | 128              | 102                |
| Melbourne         | 50.6%          | 670            | 494                      | 250              | 244                |
| Brisbane          | 25.6%          | 139            | 78                       | 20               | 58                 |
| Adelaide          | 41.5%          | 69             | 41                       | 17               | 24                 |
| Perth             | n.a.           | 8              | 6                        | 2                | 4                  |
| Tasmania          | n.a.           | 2              | 2                        | 2                | 0                  |
| Canberra          | 41.7%          | 31             | 24                       | 10               | 14                 |
| Combined capitals | 48.2%          | 1,223          | 875                      | 422              | 453                |

## Weekly clearance rates

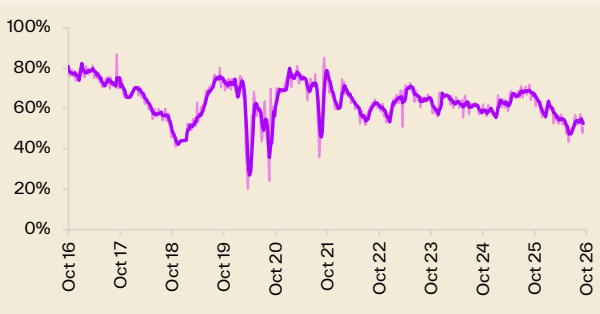
Combined capital cities



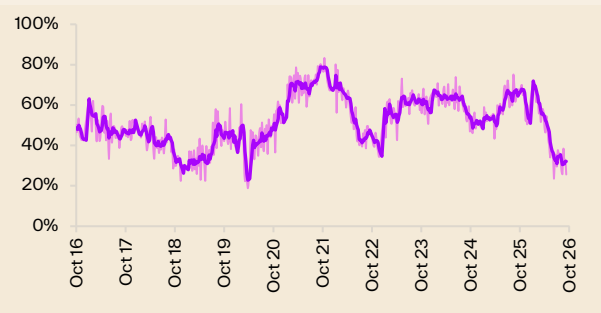
Sydney



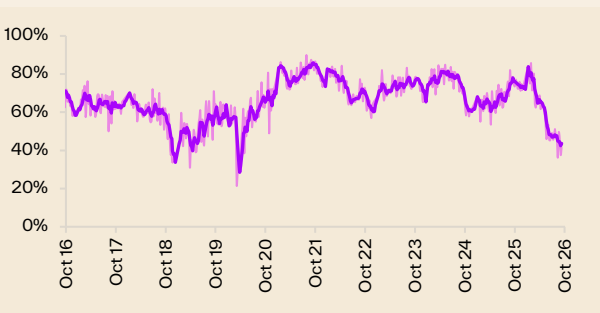
Melbourne



Brisbane



Adelaide



# Property Market Indicator Summary

## Sub-region auction statistics (Preliminary)

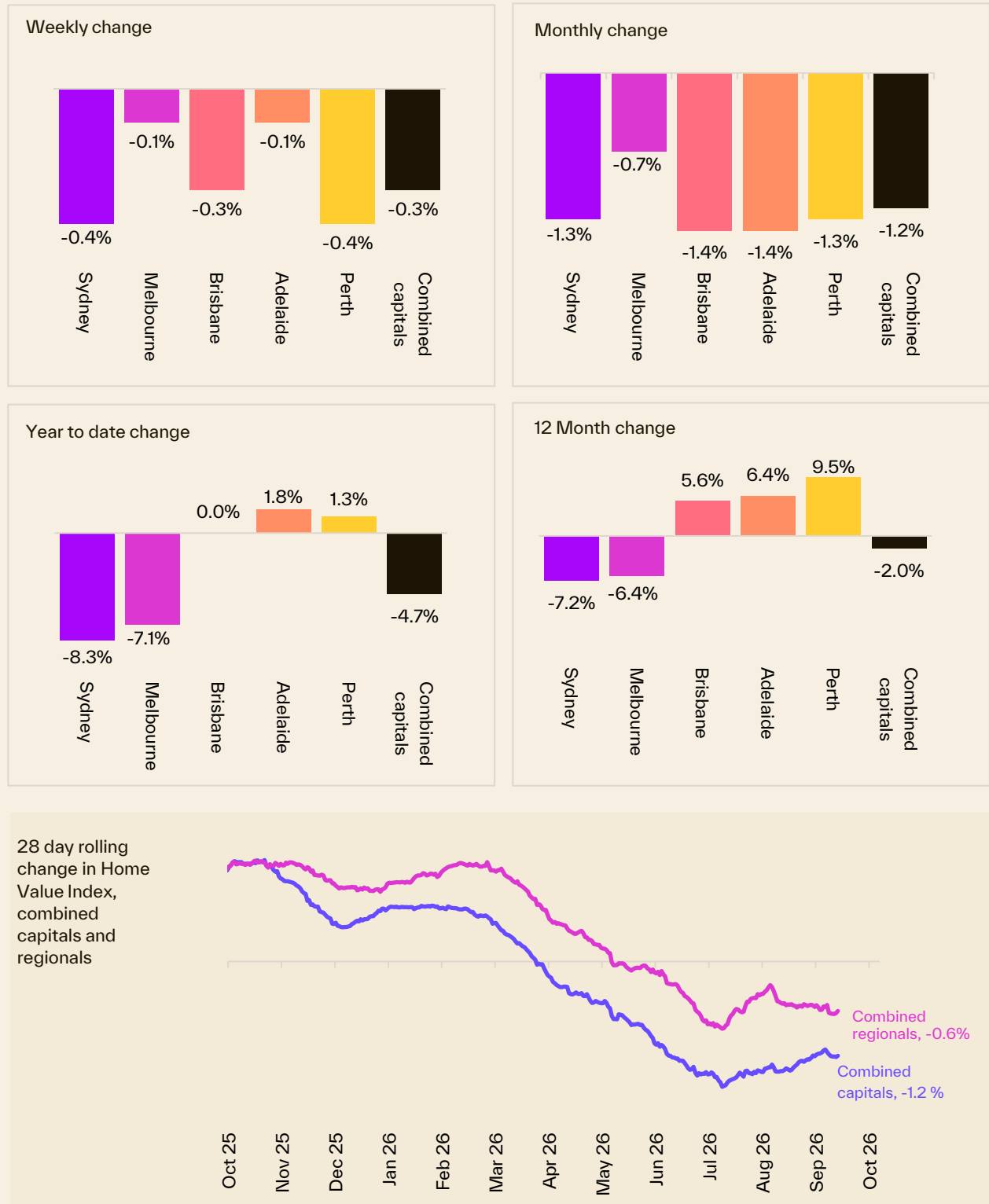
| Region                        | Clearance rate | Total auctions | Collected results | Cleared auctions | Uncleared auctions |
|-------------------------------|----------------|----------------|-------------------|------------------|--------------------|
| Sydney sub-regions            |                |                |                   |                  |                    |
| Central Coast                 | n.a.           | 12             | 5                 | 2                | 3                  |
| Baulkham Hills and Hawkesbury | 25.0%          | 15             | 12                | 3                | 9                  |
| Blacktown                     | n.a.           | 7              | 4                 | 2                | 2                  |
| City and Inner South          | 46.4%          | 40             | 28                | 13               | 15                 |
| Eastern Suburbs               | 79.2%          | 30             | 24                | 19               | 5                  |
| Inner South West              | 83.3%          | 25             | 12                | 10               | 2                  |
| Inner West                    | 68.8%          | 18             | 16                | 11               | 5                  |
| North Sydney and Hornsby      | 68.4%          | 47             | 38                | 26               | 12                 |
| Northern Beaches              | 39.5%          | 42             | 38                | 15               | 23                 |
| Outer South West              | n.a.           | n.a.           | n.a.              | 0                | 0                  |
| Outer West and Blue Mountains | n.a.           | 9              | 9                 | 5                | 4                  |
| Parramatta                    | 50.0%          | 16             | 12                | 6                | 6                  |
| Ryde                          | n.a.           | 11             | 7                 | 2                | 5                  |
| South West                    | 66.7%          | 14             | 12                | 8                | 4                  |
| Sutherland                    | 50.0%          | 19             | 14                | 7                | 7                  |
| Melbourne sub-regions         |                |                |                   |                  |                    |
| Inner                         | 56.3%          | 89             | 71                | 40               | 31                 |
| Inner East                    | 45.8%          | 60             | 48                | 22               | 26                 |
| Inner South                   | 57.1%          | 73             | 56                | 32               | 24                 |
| North East                    | 45.5%          | 96             | 66                | 30               | 36                 |
| North West                    | 49.3%          | 90             | 73                | 36               | 37                 |
| Outer East                    | 60.5%          | 50             | 38                | 23               | 15                 |
| South East                    | 67.6%          | 64             | 37                | 25               | 12                 |
| West                          | 39.6%          | 138            | 96                | 38               | 58                 |
| Mornington Peninsula          | 50.0%          | 11             | 10                | 5                | 5                  |
| Regional SA4                  |                |                |                   |                  |                    |
| Newcastle and Lake Macquarie  | n.a.           | 8              | 5                 | 1                | 4                  |
| Illawarra                     | n.a.           | 17             | 8                 | 5                | 3                  |
| Gold Coast                    | 20.6%          | 90             | 34                | 7                | 27                 |
| Sunshine Coast                | 11.1%          | 31             | 18                | 2                | 16                 |
| Geelong                       | n.a.           | 5              | 5                 | 2                | 3                  |

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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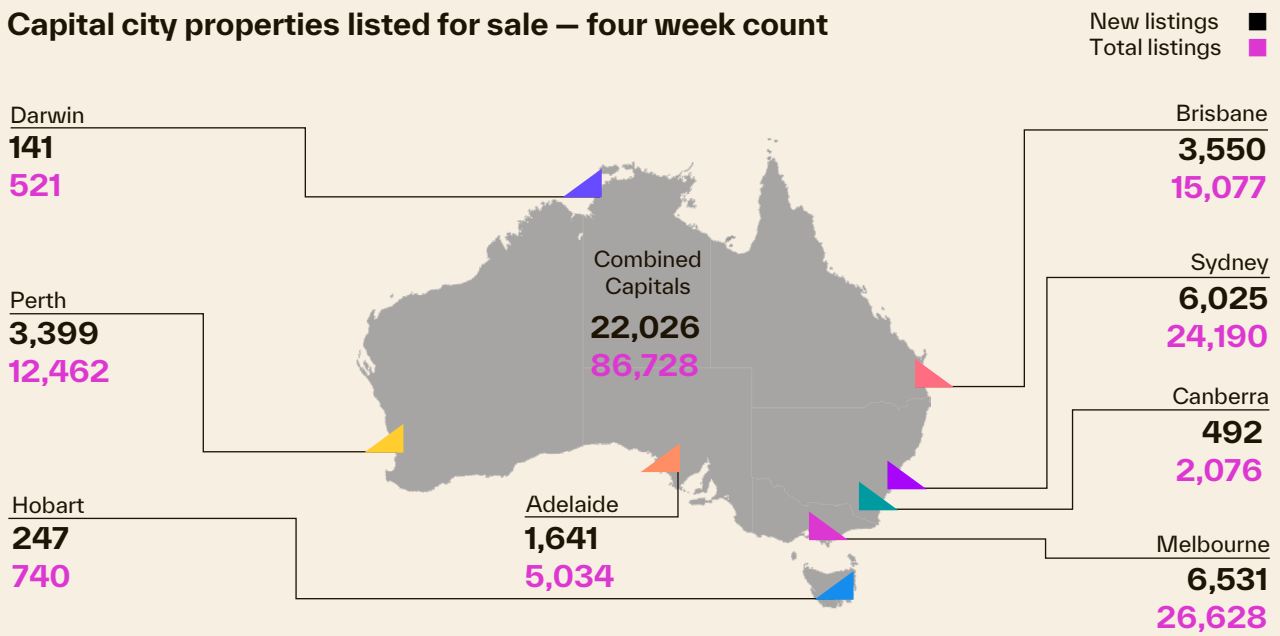
# Property Market Indicator Summary

## Capital city home value changes

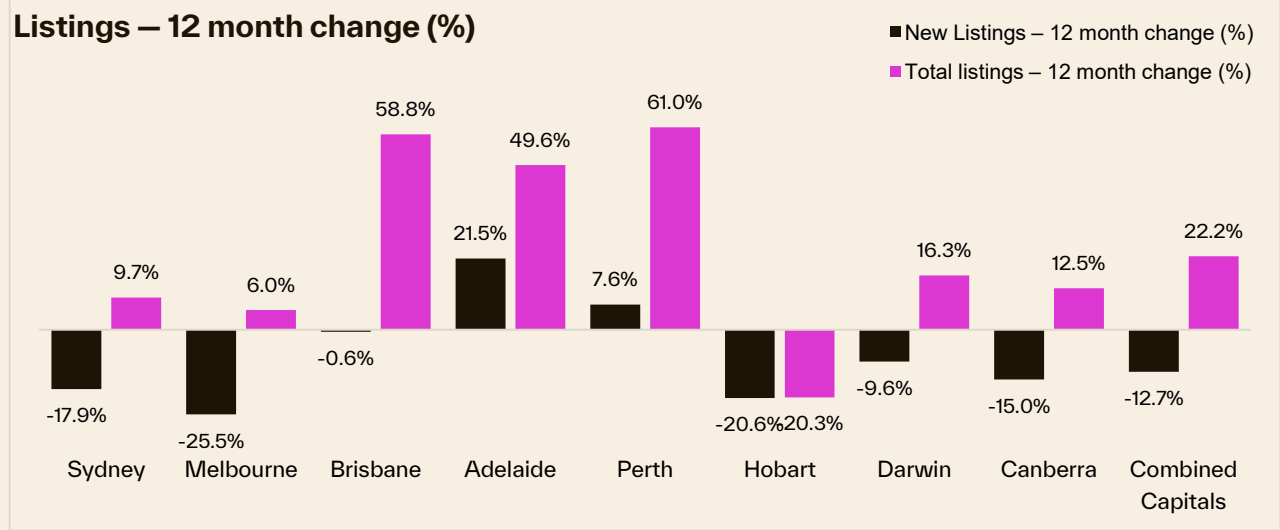


# Property Market Indicator Summary

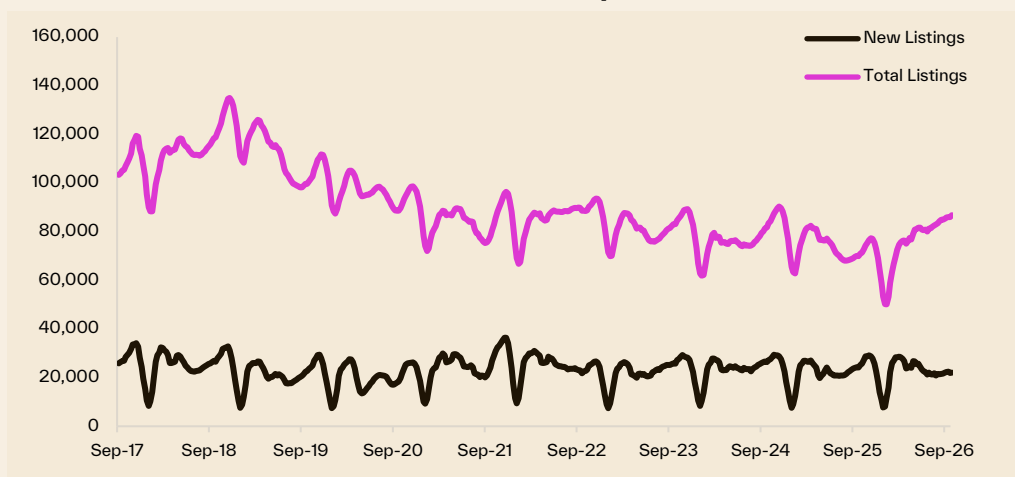
## Capital city properties listed for sale – four week count



## Listings – 12 month change (%)



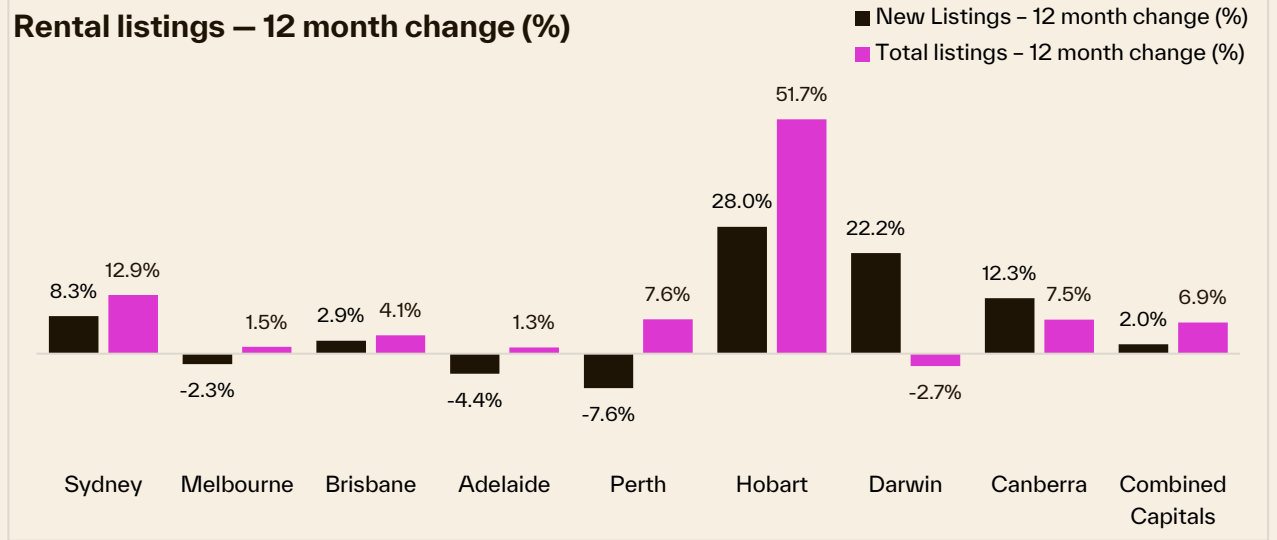
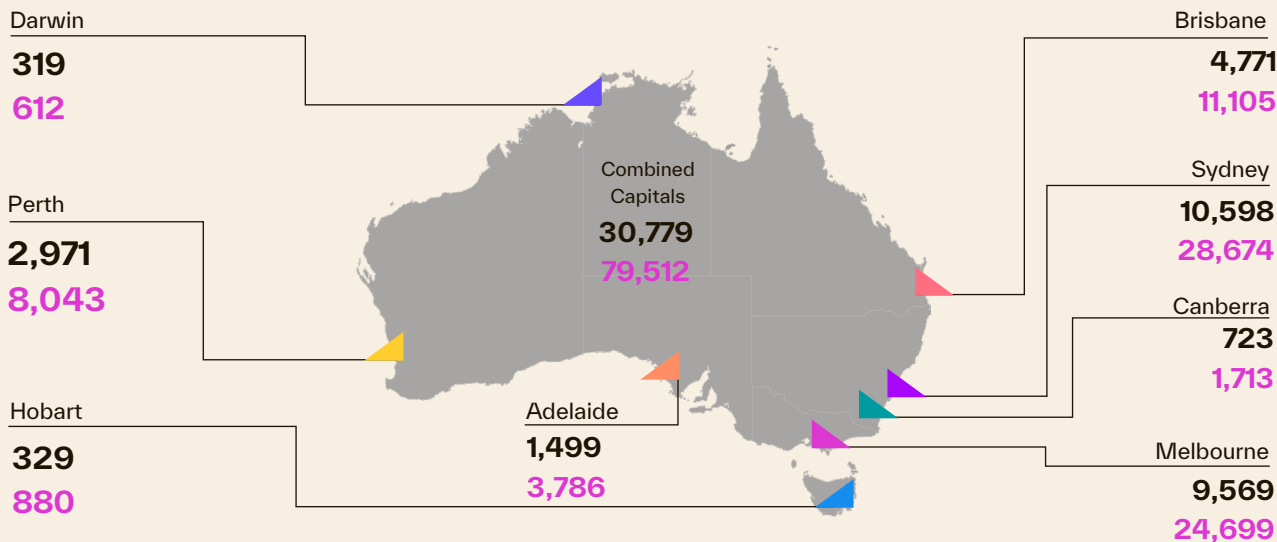
## Number of homes for sale, combined capital cities



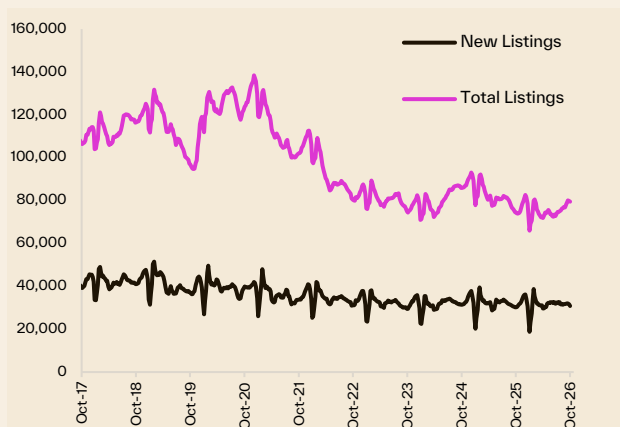
These results are calculated across properties that have been advertised for sale over the 28 days ending 04 October 2026. A new listing is one which has not been previously advertised for sale within 75 days, total listings include new listings and properties which have been previously advertised.

# Property Market Indicator Summary

## Capital city properties listed for rent – four week count



## Number of homes for rent, combined capital cities



## Rental snapshot – data to September 2026

| Region             | Median rent | Change in rents (all dwellings) |         |        | Gross yields (all dwellings) |               | Vacancy rates (all dwellings) |               |
|--------------------|-------------|---------------------------------|---------|--------|------------------------------|---------------|-------------------------------|---------------|
|                    |             | Month                           | Quarter | Annual | Current                      | 12 months ago | Current                       | 12 months ago |
| Sydney             | \$843       | -0.1%                           | -0.4%   | 4.4%   | 3.4%                         | 3.0%          | 2.5%                          | 1.8%          |
| Melbourne          | \$648       | 0.1%                            | 0.4%    | 4.9%   | 4.1%                         | 3.6%          | 1.8%                          | 1.5%          |
| Brisbane           | \$746       | 0.4%                            | 1.3%    | 6.4%   | 3.5%                         | 3.5%          | 2.3%                          | 1.8%          |
| Adelaide           | \$672       | 0.5%                            | 1.7%    | 6.3%   | 3.6%                         | 3.6%          | 1.4%                          | 1.0%          |
| Perth              | \$798       | 0.3%                            | 1.0%    | 8.0%   | 4.0%                         | 4.1%          | 2.2%                          | 1.2%          |
| Hobart             | \$637       | 0.0%                            | 0.2%    | 8.0%   | 4.4%                         | 4.4%          | 3.1%                          | 1.3%          |
| Darwin             | \$774       | 1.8%                            | 5.8%    | 11.6%  | 6.5%                         | 6.6%          | 1.9%                          | 2.1%          |
| Canberra           | \$708       | -0.3%                           | 0.1%    | 3.1%   | 4.4%                         | 4.1%          | 1.8%                          | 1.5%          |
| Combined capitals  | \$746       | 0.1%                            | 0.4%    | 5.5%   | 3.7%                         | 3.4%          | 2.1%                          | 1.6%          |
| Combined regionals | \$628       | 0.2%                            | 0.8%    | 5.6%   | 4.3%                         | 4.3%          | 2.2%                          | 1.6%          |
| National           | \$713       | 0.2%                            | 0.5%    | 5.5%   | 3.9%                         | 3.6%          | 2.1%                          | 1.6%          |

# Property Market Indicator Summary

## Top two sales over the past week, states and territories

### New South Wales



5/29 Billyard Avenue  
Elizabeth Bay

4 4 3

**\$21,500,000**

Richardson & Wrench Elizabeth Bay



1 Dumaresq Road  
Rose Bay

4 5 2

**\$17,015,000**

Ray White Double Bay

### Victoria

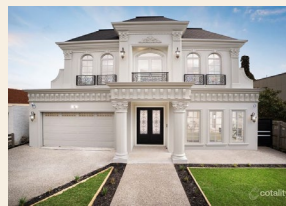


13 Kalimna Street  
Balwyn

5 4 2

**\$3,450,000**

Ray White Balwyn



91 Orchard Street  
Glen Waverley

5 5 2

**\$3,301,000**

Ray White Judd White Group

### Queensland



510 The Panorama  
Tallai

6 6 10

**\$8,250,000**

Kollosche



5 Monte Vista Court  
Broadbeach Waters

4 4 2

**\$4,250,000**

Kollosche

### South Australia



5 Chapel Street  
Plympton

3 1 1

**\$2,600,000**

OC



15 Newhaven Avenue  
Glenelg North

3 1 4

**\$2,050,000**

Belle Property Glenelg

### Western Australia



99 Salvado Road  
Subiaco

4 3 3

**\$2,440,000**

DUET Property Group



402/9 Wren Street  
Mount Pleasant

4 2 2

**\$2,150,000**

Inhabit Property

# Property Market Indicator Summary

## Top two sales over the past week, states and territories

### Tasmania



463 Brighton Road  
Pontville

 4  2  2

**\$1,550,000**

*Insitu Property Hobart*



906 Cambridge Road  
Cambridge

 4  2  4

**\$1,166,500**

*Petrusma Property - Hobart*

### Northern Territory



34 Damirrinda Street  
Lyons

 4  2  2

**\$894,000**

*Ray White Darwin*



18 Peregrine Street  
Wulagi

 3  1  1

**\$800,000**

*Smith Real Estate NT*

### Australian Capital Territory



3 Scott Street  
Narrabundah

 4  2  2

**\$2,030,000**

*Hive Property*



16/62 Constitution Avenue  
Parkes

 3  2  2

**\$1,595,000**

*Suburbia Real Estate*

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