cotality

Property Market Indicator Summary

All data to week ending 6th September 2026

Volumes open spring 31% down on last year, as clearance rates steady

In the opening week of the spring season, 1,462 homes were auctioned across the combined capital cities, a softer start than a year earlier, with volumes down 31.1%. Auction volumes were unchanged from the previous week, the fourth consecutive week in which they remained more than 30% below year-ago levels. Auction activity is anticipated to lift over the coming weeks, rising to around 1,640 this week and 1,900 next week.

The preliminary clearance rate for the combined capital cities remained steady at 52.7%, an increase of 25 basis points from the previous week's 52.4%. The spring season commenced with a preliminary rate only 41 basis points higher than the winter preliminary average of 52.3%.

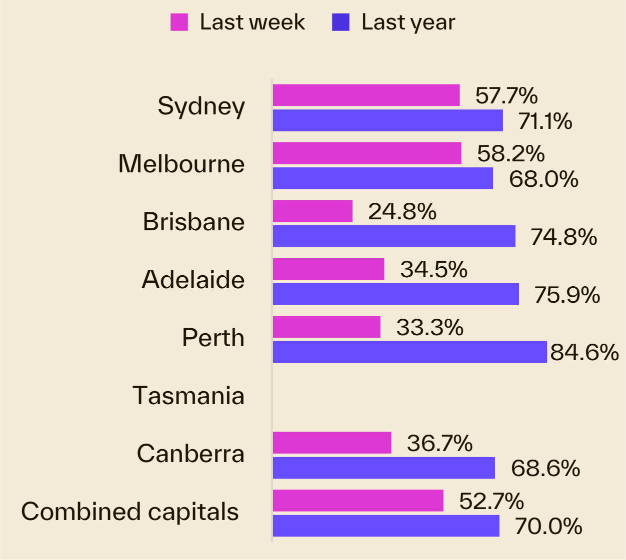
Melbourne held the most auctions, with 662 homes going under the hammer, up 2.8% on the previous week, though 27.9% lower than the same week a year earlier. The preliminary clearance rate rose to 58.2%, up from 54.9% the previous week and a four-week high. Across Sydney, the preliminary clearance rate rose 1.4 percentage points to 57.7%, an 18-week high, on a relatively steady 523 homes auctioned, 2.8% higher than the previous week but 27.9% lower than the same period a year earlier.

In Brisbane, 133 homes went under the hammer, which was 8.9% fewer than the previous week and 7.6% below the same time last year, while the preliminary clearance rate remained subdued at just 24.8%, the second lowest of the year so far, after the 23.8% in the first week of June. Adelaide held 95 auctions, down 6.9% from the previous week but up 13.1% from the same week last year. Just 34.5% of auctions cleared, a significant 16.2 percentage-point decline and the lowest early clearance rate in the city since April 2020.

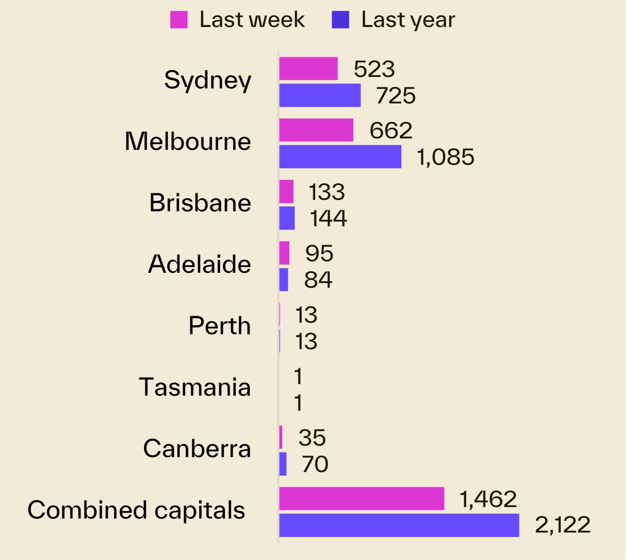
Canberra's preliminary clearance rate dropped to 36.7%, the lowest in seven weeks and well below the winter average of 45.4%. There were 35 auctions held last week, down roughly 27.1% from the previous week and half the number held a year ago. Perth held 13 auctions, and a third (33.3%) sold. Only one auction took place in Tasmania.

Capital City Auction Statistics (Preliminary)

Clearance rate



Total auctions



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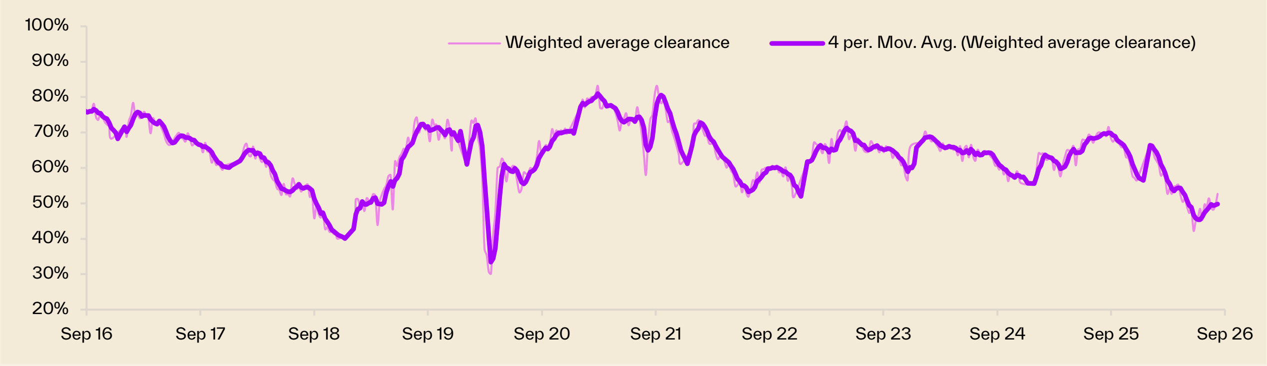
Property Market Indicator Summary

Capital City Auction Statistics (Preliminary)

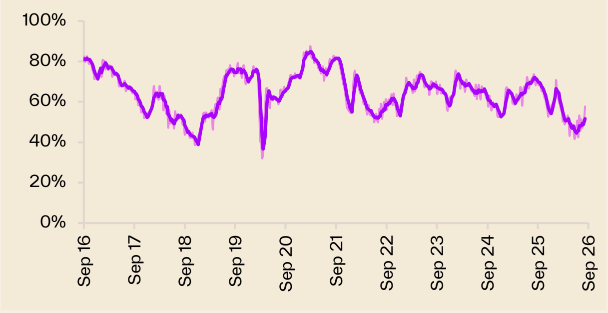
City	Clearance rate	Total auctions	Cotality auction results	Cleared auctions	Uncleared auctions
Sydney	57.7%	523	402	232	170
Melbourne	58.2%	662	546	318	228
Brisbane	24.8%	133	101	25	76
Adelaide	34.5%	95	55	19	36
Perth	33.3%	13	12	4	8
Tasmania	n.a.	1	1	0	1
Canberra	36.7%	35	30	11	19
Combined capitals	**52.7%**	**1,462**	**1,147**	**604**	**543**

Weekly clearance rates

Combined capital cities

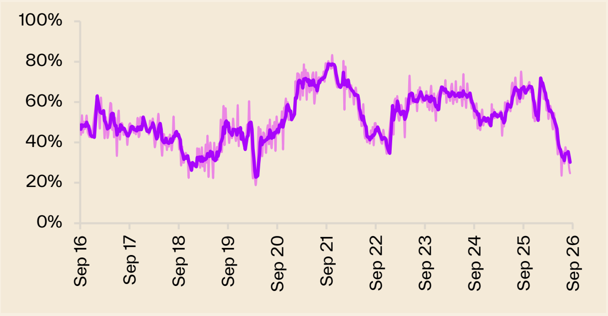


Sydney

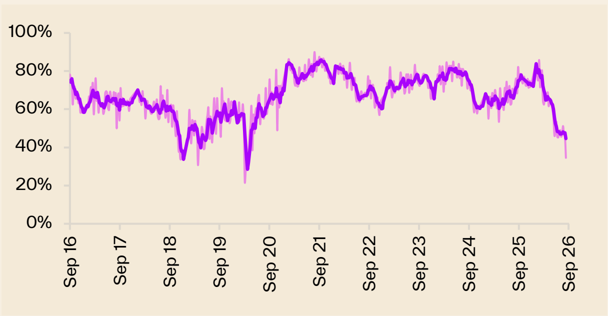


Melbourne

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.	8	7	1	6
Baulkham Hills and Hawkesbury	61.5%	20	13	8	5
Blacktown	61.5%	28	13	8	5
City and Inner South	50.0%	47	38	19	19
Eastern Suburbs	80.3%	71	66	53	13
Inner South West	63.0%	67	54	34	20
Inner West	63.3%	39	30	19	11
North Sydney and Hornsby	56.9%	84	58	33	25
Northern Beaches	46.0%	39	37	17	20
Outer South West	n.a.	6	5	1	4
Outer West and Blue Mountains	n.a.	5	4	0	4
Parramatta	63.2%	30	19	12	7
Ryde	55.6%	36	27	15	12
South West	35.7%	18	14	5	9
Sutherland	41.2%	25	17	7	10
Melbourne sub-regions					
Inner	62.1%	105	87	54	33
Inner East	54.8%	103	93	51	42
Inner South	56.5%	90	69	39	30
North East	61.3%	91	75	46	29
North West	64.2%	77	67	43	24
Outer East	75.0%	41	32	24	8
South East	68.0%	67	50	34	16
West	38.1%	76	63	24	39
Mornington Peninsula	30.0%	12	10	3	7
Regional SA4					
Newcastle and Lake Macquarie	90.9%	11	11	10	1
Illawarra	n.a.	6	4	1	3
Gold Coast	39.5%	49	38	15	23
Sunshine Coast	n.a.	16	9	5	4
Geelong	n.a.	5	2	1	1

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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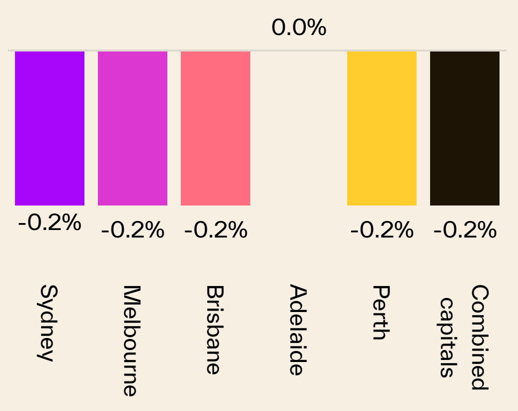
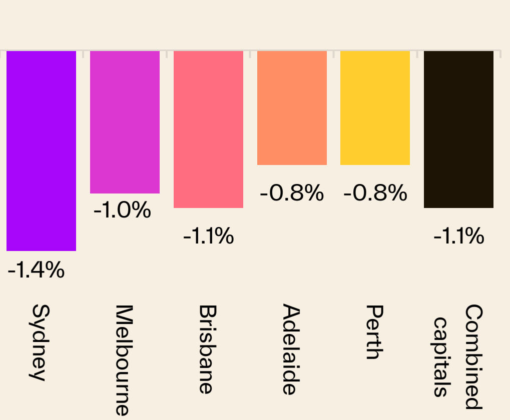
Property Market Indicator Summary

Capital city home value changes

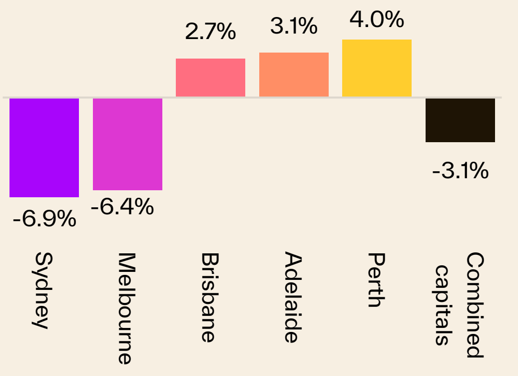
Weekly change



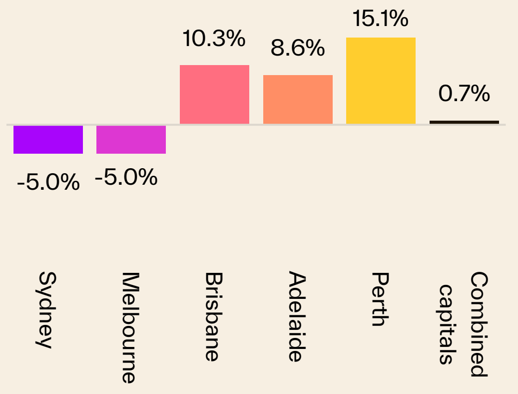
Monthly change



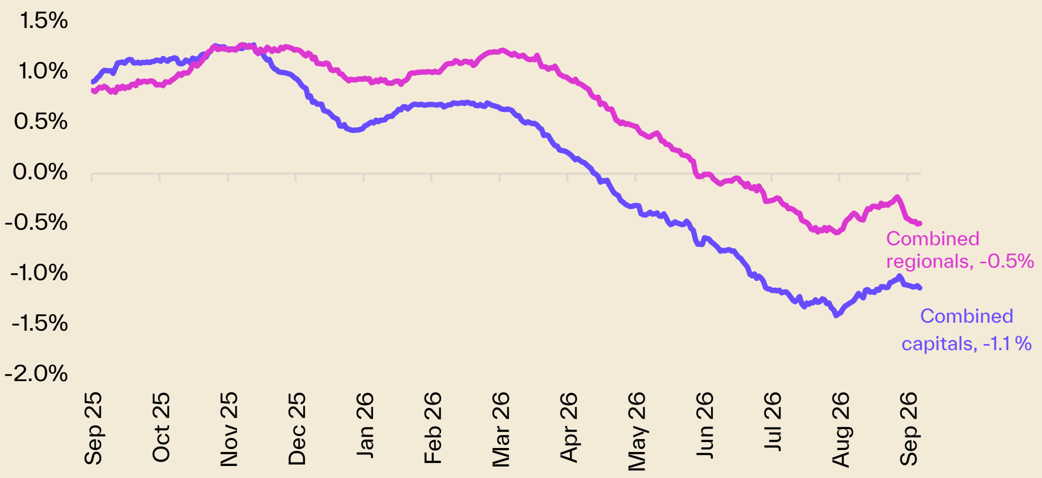
Year to date change



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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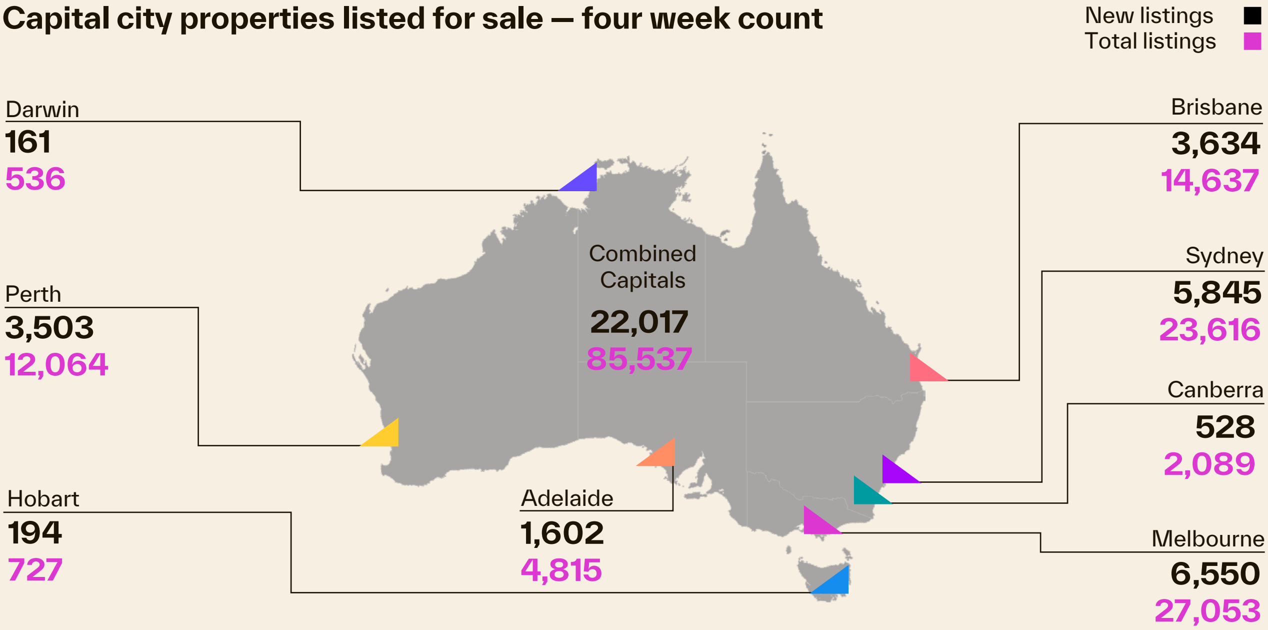
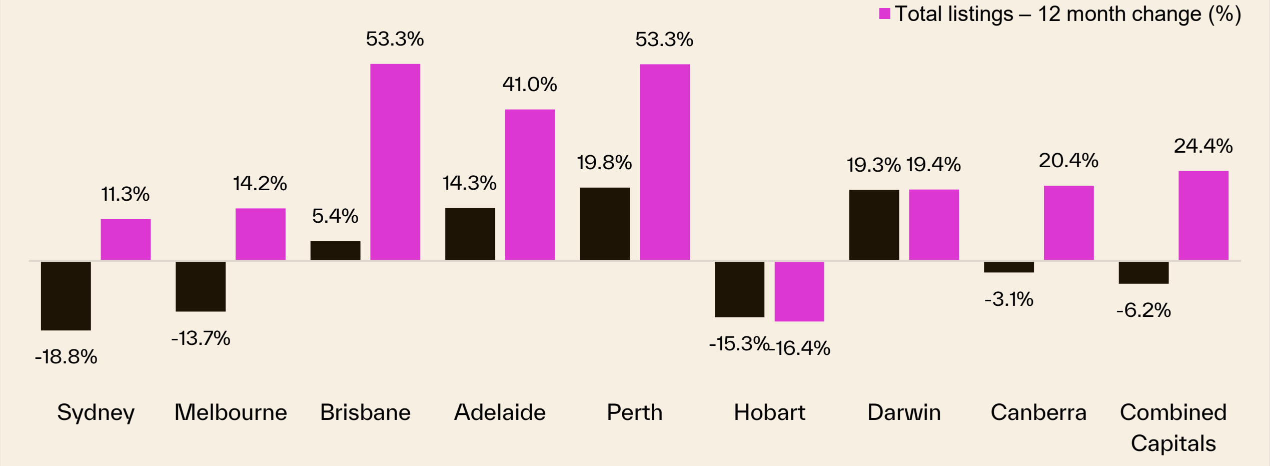
Property Market Indicator Summary

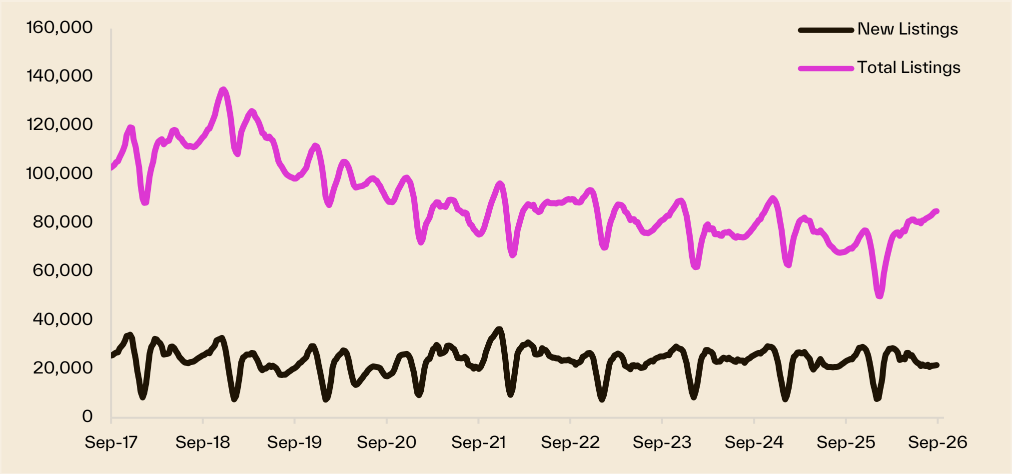
Capital city properties listed for sale — four week count



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 06 September 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.

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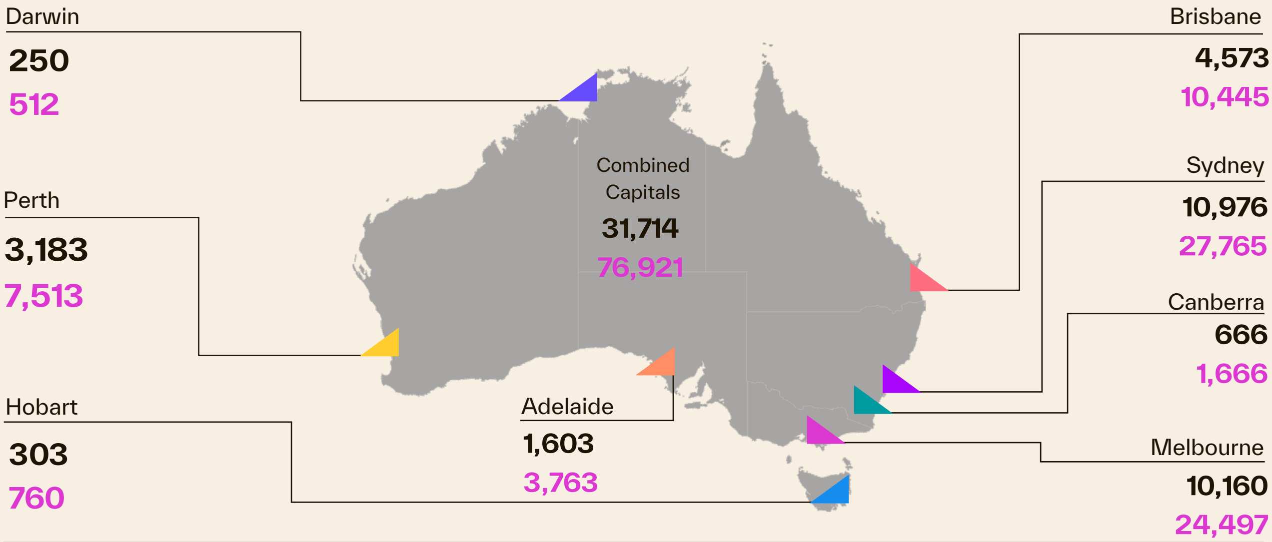
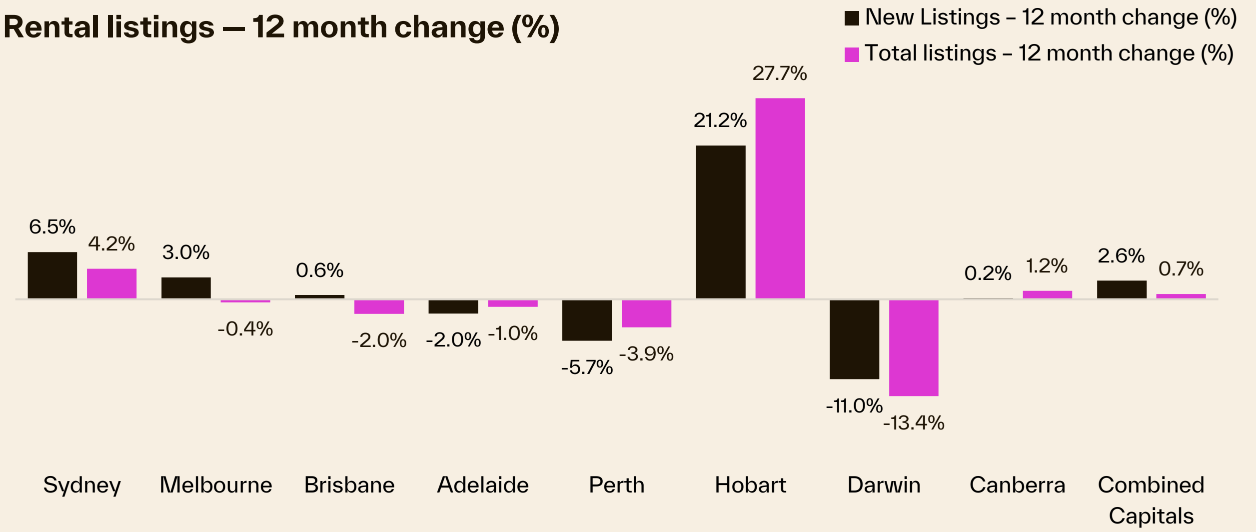
Property Market Indicator Summary

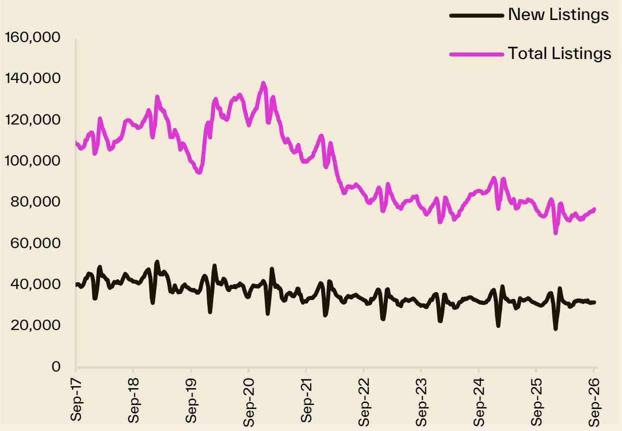
Capital city properties listed for rent — four week count



Rental listings — 12 month change (%)



Number of homes for rent, combined capital cities



Rental snapshot — data to August 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	$842	-0.2%	-0.2%	4.8%	3.3%	3.0%	2.2%	1.8%
Melbourne	$648	0.1%	0.7%	5.0%	4.0%	3.6%	1.6%	1.5%
Brisbane	$742	0.4%	1.4%	6.4%	3.4%	3.6%	2.0%	1.8%
Adelaide	$670	0.6%	1.7%	5.8%	3.6%	3.7%	1.3%	1.0%
Perth	$790	0.3%	1.2%	8.0%	3.9%	4.2%	1.8%	1.3%
Hobart	$633	0.6%	0.9%	7.9%	4.4%	4.3%	2.6%	1.4%
Darwin	$757	2.0%	5.5%	11.4%	6.3%	6.6%	1.5%	1.8%
Canberra	$712	0.3%	0.8%	3.2%	4.3%	4.1%	1.8%	1.6%
Combined capitals	$744	0.1%	0.7%	5.7%	3.6%	3.4%	1.9%	1.6%
Combined regionals	$626	0.3%	0.9%	5.8%	4.3%	4.3%	2.0%	1.7%
National	**$711**	**0.2%**	**0.7%**	**5.7%**	**3.8%**	**3.6%**	**1.9%**	**1.6%**

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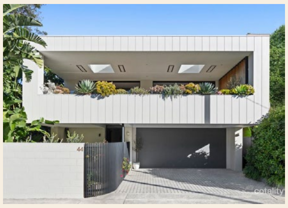
Property Market Indicator Summary

Top two sales over the past week, states and territories

New South Wales



44A Queens Park Road
Queens Park

4 3 4

$5,850,000

Ray White Eastern Beaches Coogee

13 De Villiers Rise
Bella Vista

4 5 4

$4,750,000

Ray White Castle Hill

Victoria

102 Beaconsfield Parade
Albert Park

4 2 2

$4,000,000

Marshall White Port Phillip

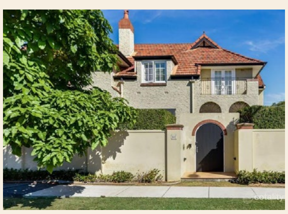
2 Woodlands Close
Park Orchards

5 3 4

$3,040,000

Jellis Craig Doncaster

Queensland

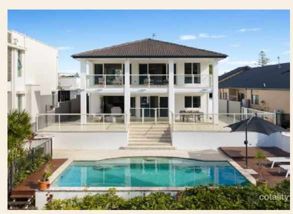


60 Kitchener Road
Ascot

5 3 2

$6,225,000

Place Estate Agents - Ascot



24 Amalfi Drive
Isle Of Capri

4 3 4

$4,350,000

Kollosche

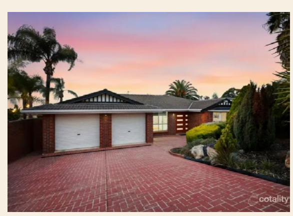
South Australia

3/10 North Esplanade
Glenelg North

3 2 2

$1,960,000

Belle Property Glenelg



1 Rocklyn Court
Gulfview Heights

7 4 4

$1,710,000

Eclipse Real Estate

Western Australia

25A Sulman Ave
Salter Point

4 2 2

$2,710,000

Haiven Property South

116 Ardross Street
Mount Pleasant

3 1 3

$2,700,000

Ross & Galloway Property

Property Market Indicator Summary

Top two sales over the past week, states and territories

Tasmania

355 Davey St
South Hobart

3 2 4

$1,585,000

Petrusma Property - Hobart/ Sandy Bay

2 Tamar View Drive
Riverside

6 3 4

$1,350,000

Harcourts Launceston

Northern Territory

21 Bedford Court
Durack

5 2 2

$955,000

Ray White Palmerston

8 Dongara Court
Karama

2 1 2

$600,000

Nick Mousellis Real Estate

Australian Capital Territory

36 Miller Street
O'Connor

4 3 2

$2,850,000

Belle Property Canberra

3 Juad Place
Aranda

4 2 1

$1,330,000

Hive Property

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