Property Market Indicator Summary

All data to week ending 13th September 2026

Combined capitals clearance rate rises to 58.5%, its strongest in 19 weeks

The preliminary combined capitals clearance rate increased by 5.8 percentage points last week, reaching 58.5%, which represented the strongest result in 19 weeks. This improvement followed a period of relatively low rates. Throughout the same 19-week period, the preliminary rate remained below 60% and was significantly lower than the rate recorded a year earlier, when 69.0% of homes sold at auction.

The increase in clearance rate occurred alongside higher auction volumes, with 1,594 capital city homes taken to auction. Auction numbers rose by 11.4% compared to the previous week but remained 33.6% lower than the same period last year, marking the fifth consecutive week with a decline in excess of 30% on the previous year. This decline is attributed to fewer new listings and a greater proportion of vendors choosing to sell by private treaty rather than at auction while clearance rates remain subdued.

Melbourne held 45% of all auctions, with 713 homes going under the hammer. That was an 8.7% rise on two weeks ago but 42.5% down on a year ago, the largest drop of any capital against the same week in 2025. At 63.3%, Melbourne's preliminary clearance rate was a 24 week high and the strongest across the capitals.

Sydney's preliminary clearance rate rose 1.9 percentage points to 59.6%, its highest result in 19 weeks. The city held 557 auctions, an increase of 11.2% on two weeks ago, though still 32.8% below the level of a year earlier.

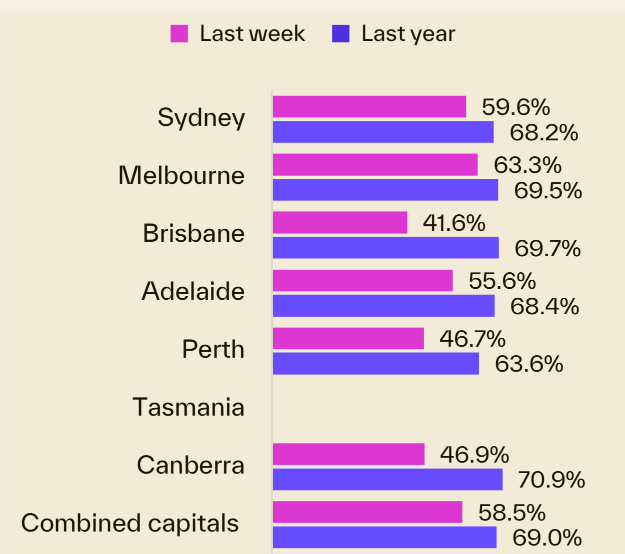
Brisbane held more auctions than a year ago, with 168 in total, up 15.9% over the year and 28.2% on the previous week. The preliminary clearance rate increased sharply to 41.6%, the highest early result in four weeks and 16.8 percentage points above lasts week's 24.8%. That said, it remained around 28 percentage points below the 69.7% recorded a year ago, and Brisbane still finished below every other capital.

In Adelaide, 78 homes were taken to auction, representing a rough 17% decrease from the previous week and a 20.4% decline compared to the same period last year. At 55.6%, the preliminary clearance rate was 21 percentage points above the 34.5% recorded two weeks earlier. There were 57 auctions held in the ACT, up from 35 two weeks ago but down almost 28% on the volume a year ago. The preliminary clearance rate came in at 46.9%, up 10.2 percentage points.

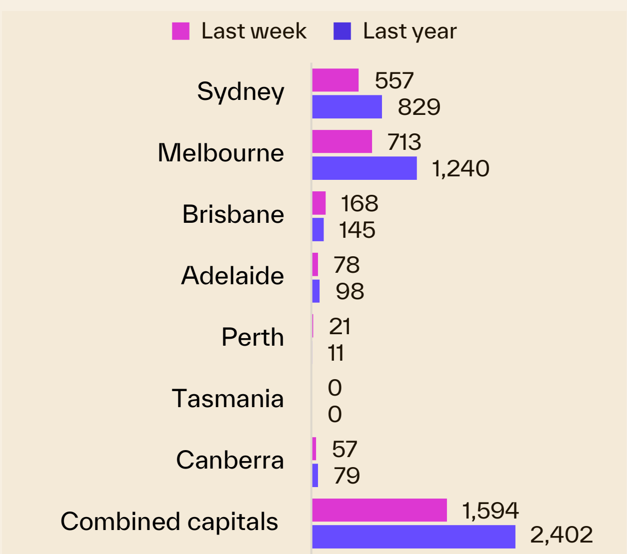
Auction volumes are expected to rise as the spring season advances, although they are likely to remain lower than the levels recorded last year. Approximately 1,930 homes are scheduled for auction this week, with the number projected to decrease to around 1,510 next week due to the AFL Grand Final long weekend in Victoria.

Capital City Auction Statistics (Preliminary)

Clearance rate



Total auctions



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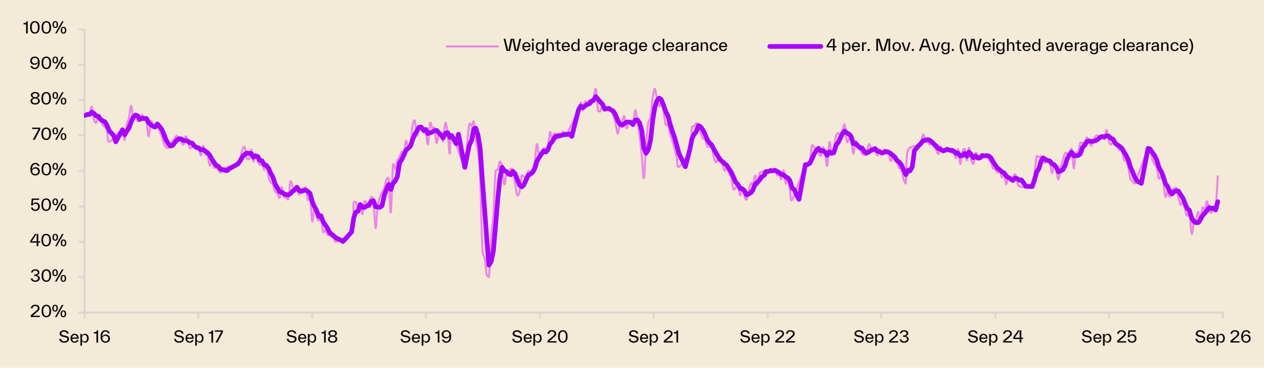
Property Market Indicator Summary

Capital City Auction Statistics (Preliminary)

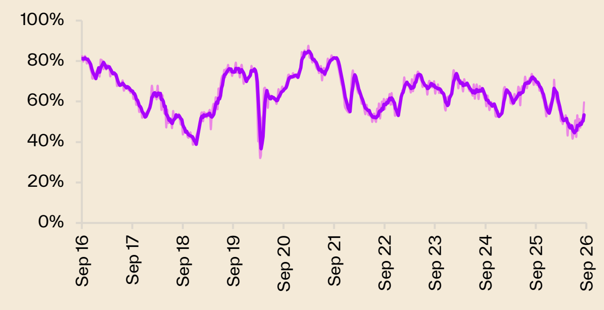
City	Clearance rate	Total auctions	Cotality auction results	Cleared auctions	Uncleared auctions
Sydney	59.6%	557	394	235	159
Melbourne	63.3%	713	577	365	212
Brisbane	41.6%	168	125	52	73
Adelaide	55.6%	78	54	30	24
Perth	46.7%	21	15	7	8
Tasmania	n.a.	0	0	0	0
Canberra	46.9%	57	32	15	17
Combined capitals	58.5%	1,594	1,197	701	496

Weekly clearance rates

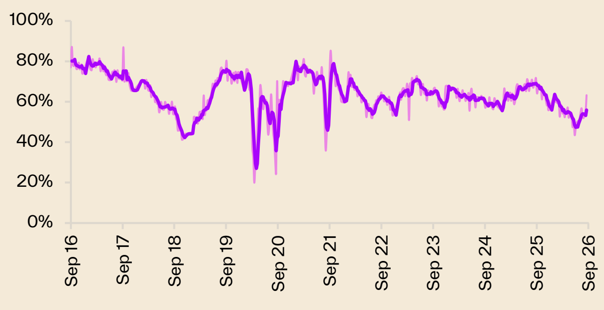
Combined capital cities



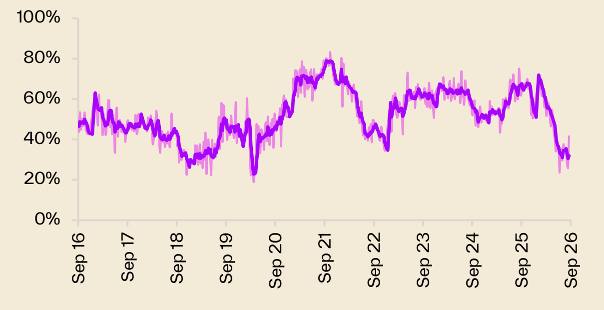
Sydney



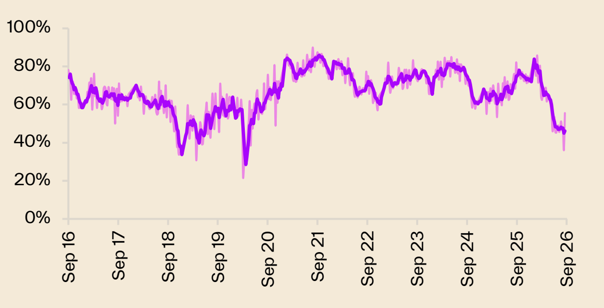
Melbourne



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.	5	3	1	2
Baulkham Hills and Hawkesbury	50.0%	32	16	8	8
Blacktown	56.3%	35	16	9	7
City and Inner South	61.9%	69	63	39	24
Eastern Suburbs	64.0%	56	50	32	18
Inner South West	63.9%	57	36	23	13
Inner West	51.2%	54	41	21	20
North Sydney and Hornsby	55.4%	80	56	31	25
Northern Beaches	47.6%	23	21	10	11
Outer South West	90.0%	11	10	9	1
Outer West and Blue Mountains	n.a.	5	3	2	1
Parramatta	68.8%	40	16	11	5
Ryde	64.0%	36	25	16	9
South West	52.9%	25	17	9	8
Sutherland	66.7%	29	21	14	7
Melbourne sub-regions					
Inner	65.0%	119	100	65	35
Inner East	57.5%	109	87	50	37
Inner South	63.2%	102	87	55	32
North East	66.7%	89	69	46	23
North West	63.3%	61	49	31	18
Outer East	65.7%	42	35	23	12
South East	76.1%	91	71	54	17
West	47.7%	80	65	31	34
Mornington Peninsula	71.4%	20	14	10	4
Regional SA4					
Newcastle and Lake Macquarie	n.a.	11	9	6	3
Illawarra	n.a.	3	2	2	0
Gold Coast	36.4%	49	33	12	21
Sunshine Coast	40.0%	26	20	8	12
Geelong	n.a.	5	4	0	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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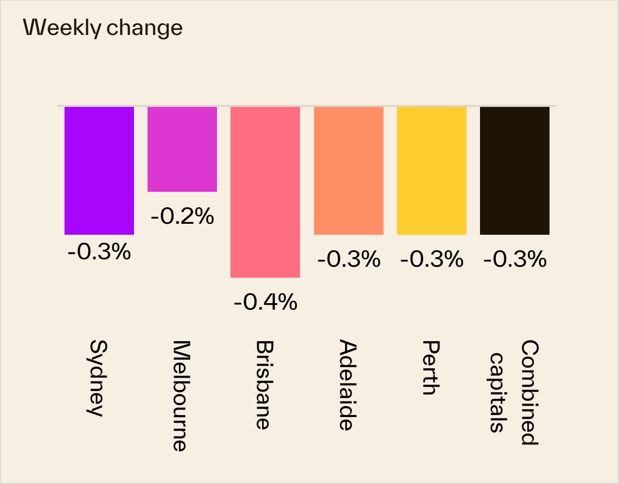
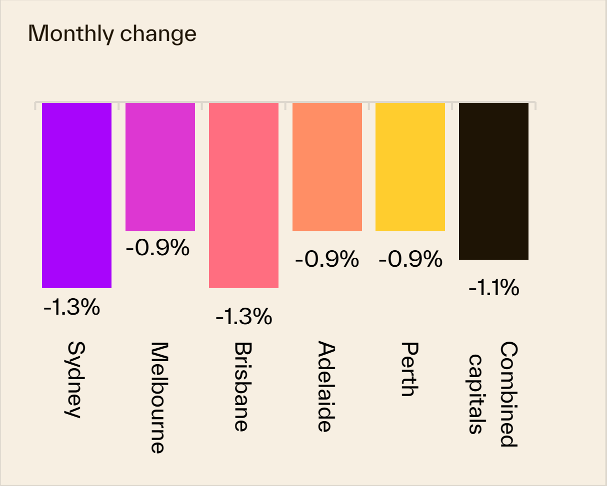
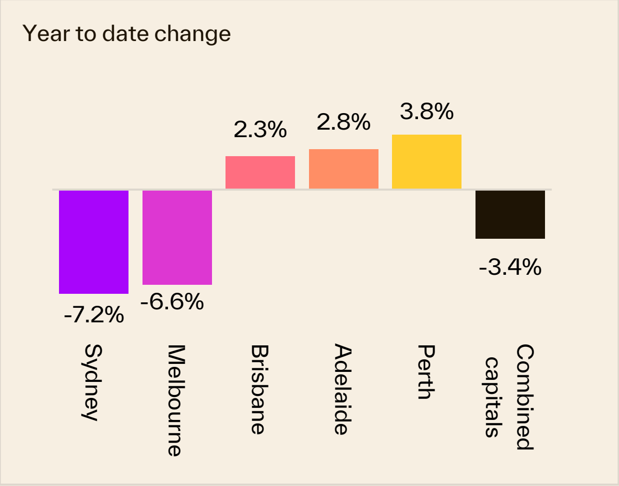
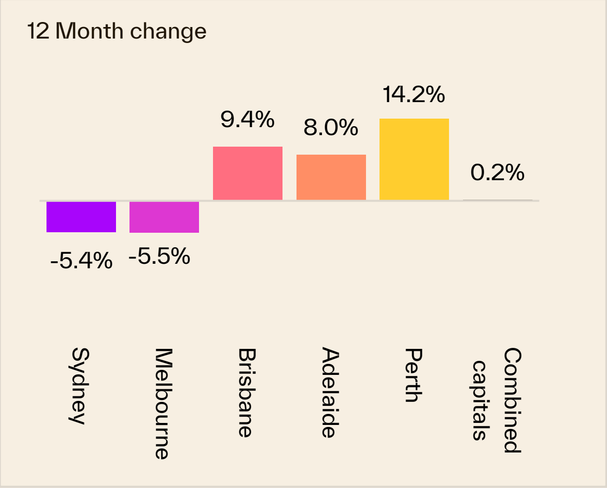
Property Market Indicator Summary

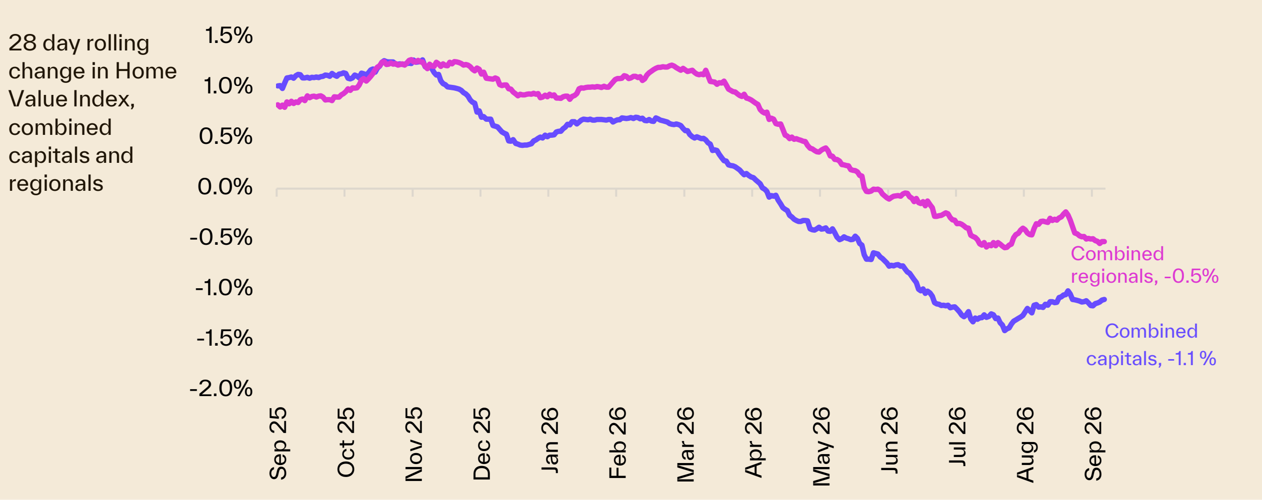
Capital city home value changes











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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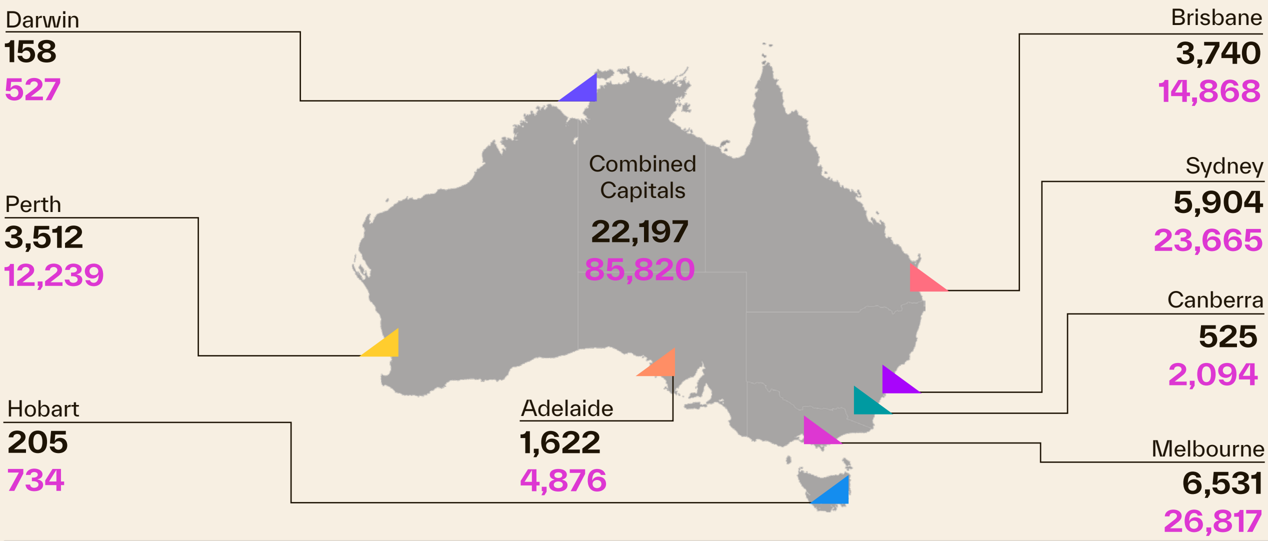
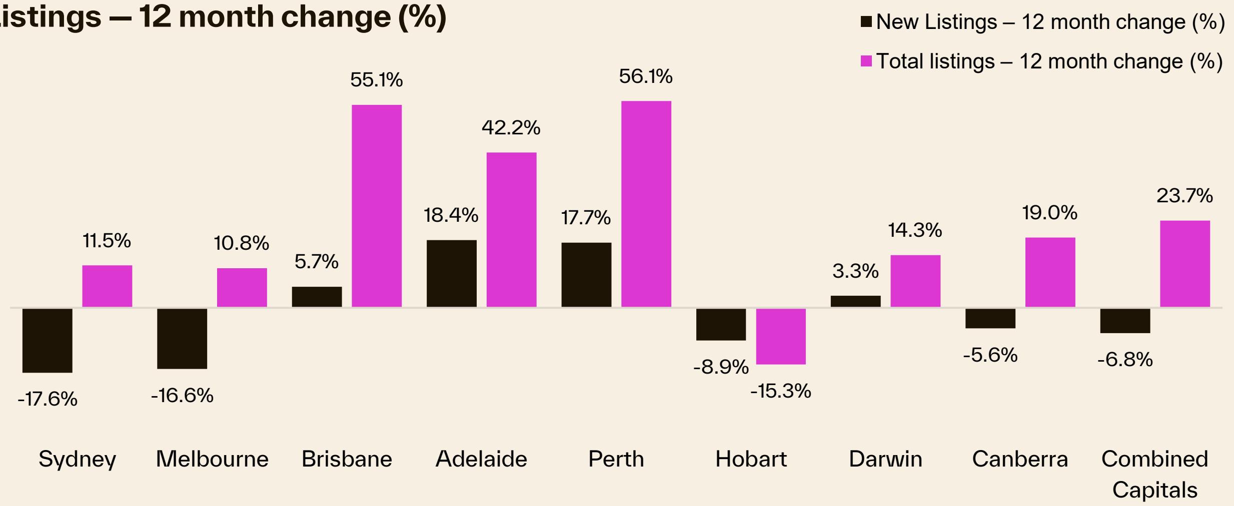
Property Market Indicator Summary

Capital city properties listed for sale — four week count

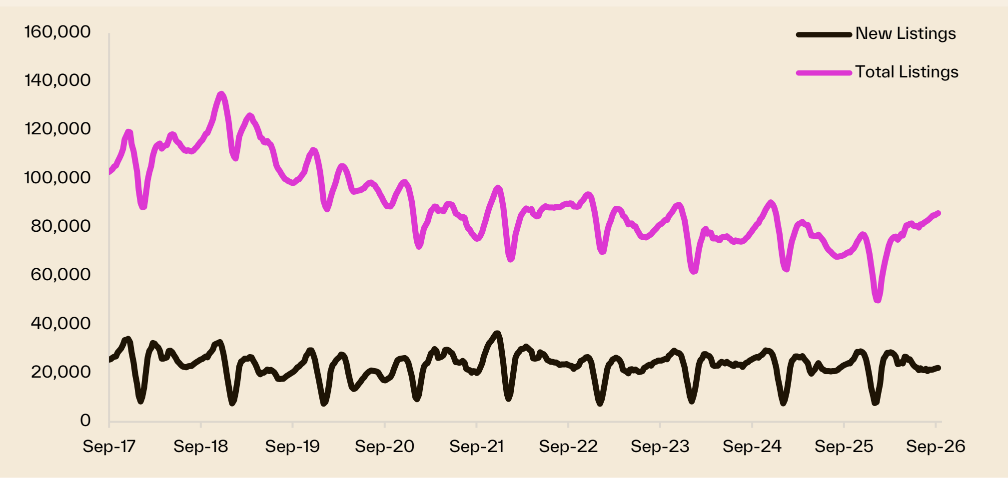
New listings ■
Total listings ■



Listings — 12 month change (%)



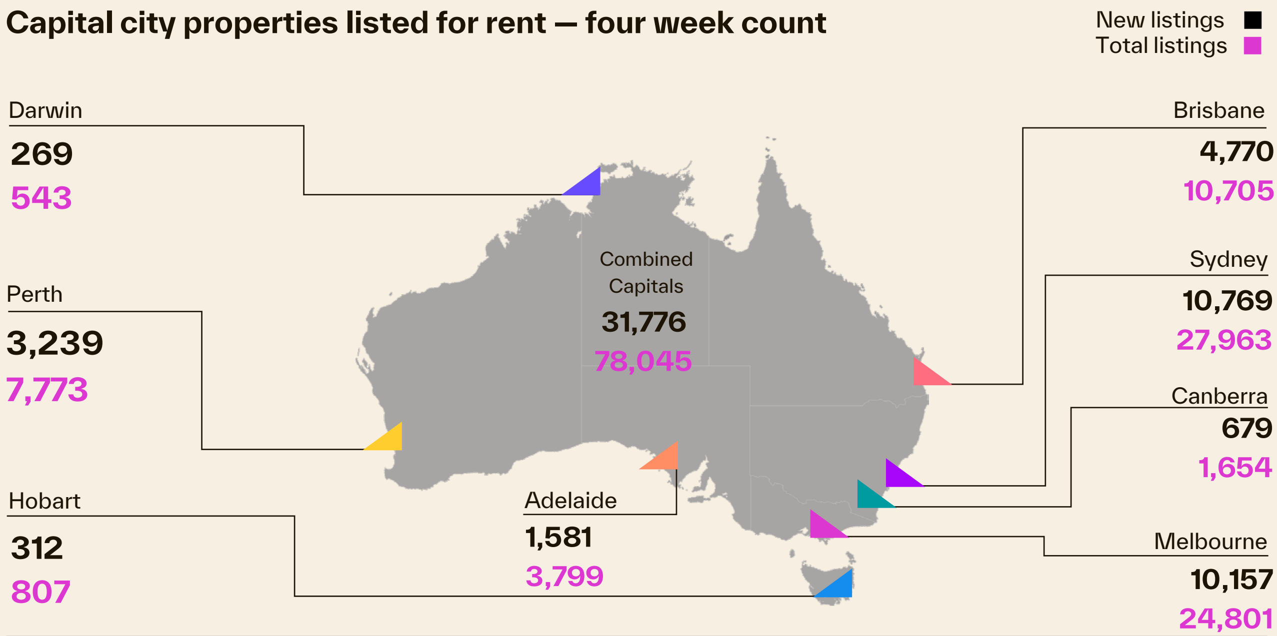
Number of homes for sale, combined capital cities



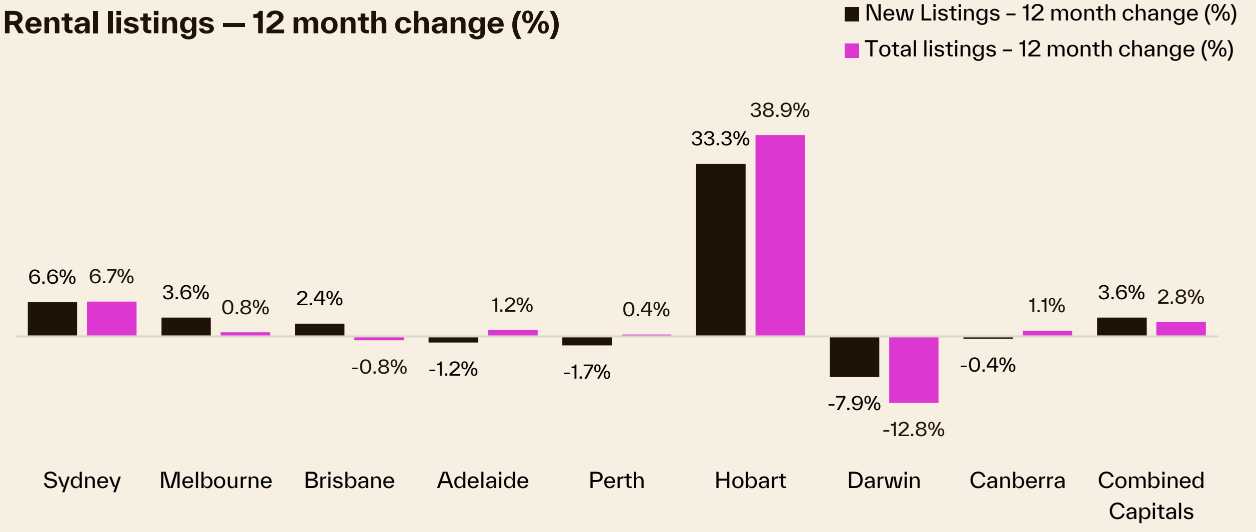
These results are calculated across properties that have been advertised for sale over the 28 days ending 13 September 2026. A new listing is one which has not been previously advertised for sale within 75 days, total listings include new listings and properties which have been previously advertised.

Property Market Indicator Summary

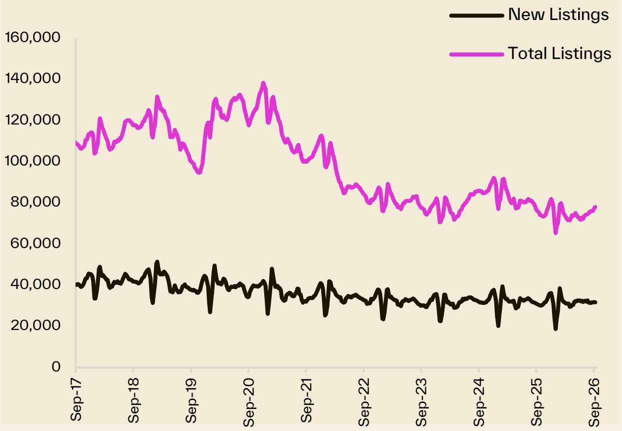
Capital city properties listed for rent — four week count



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%**

Property Market Indicator Summary

Top two sales over the past week, states and territories

New South Wales

13 Augusta Street
Strathfield

5 3 4

$6,350,000

McGrath Strathfield

60 Womurrung Avenue
Castle Hill

5 5 6

$5,200,000

Louis Carr West Pennant Hills

Victoria

2/52 Black Street
Brighton

3 3 3

$4,455,000

Marshall White Bayside

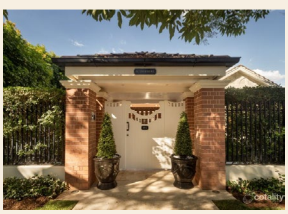
38 Brewster Street
Essendon

5 3 2

$4,300,000

McDonald Upton

Queensland



1 Sutherland Avenue
Ascot

6 5 3

$17,000,000

Ray White Collective Luxury

20 Rebecca Court
Broadbeach Waters

6 5 4

$8,450,000

John Reid Real Estate

South Australia

49A Tutt Avenue
Kingswood

5 2 4

$2,030,000

Noakes Nickolas

9 Anson Avenue
Clapham

4 2 2

$1,900,000

Ray White Unley

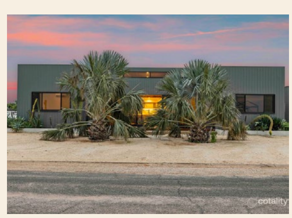
Western Australia

5 Portree Way
Ardross

5 2 3

$2,962,000

Ray White Dalkeith | Claremont



28 Hall Street
Exmouth

4 2 4

$2,030,000

Ray White Exmouth

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Property Market Indicator Summary

Top two sales over the past week, states and territories

Tasmania

6 Beach Rd
Lindisfarne

6 | 2 | 3

$1,425,000

Petrusma Property - Hobart/ Sandy Bay

387 Lenah Valley Road
Lenah Valley

4 | 1 | 2

$1,200,000

Petrusma Property - Hobart/ Sandy Bay

Northern Territory

5 Norcock Place
Rapid Creek

5 | 2 | 4

$1,400,000

Ray White Darwin

2/3 D'Ambrosio Court
Parap

3 | 2 | 2

$975,000

Ray White Darwin

Australian Capital Territory

3 Plunkett Street
Chifley

4 | 2 | 2

$1,750,000

Hive Property

26 Mclachlan Crescent
Weetangera

4 | 2 | 1

$1,470,000

The Property Collective

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