cotality

Property Market Indicator Summary

All data to week ending 20th September 2026

Capital city auction volumes lift 15.6% as clearance rates ease to 54.0%

The preliminary clearance rate across the combined capital cities decreased by 4.6 percentage points last week to 54.0%, following two consecutive weeks of increases. This decline coincided with a 15.6% rise in auction volumes and deteriorating interest rate expectations prior to the Reserve Bank's monetary policy board meeting on 29 September. Despite the decrease, auction markets remained above the winter average of a 52.3% preliminary clearance rate.

Auction volumes had, for the sixth week in a row, fallen by more than 30% compared to the same time last year. This shortfall was due to fewer new listings coming onto the market in the spring and also because fewer vendors decided to sell by auction, since clearance rates have been low and there are few registered bidders.

Melbourne held 900 auctions, almost half (49%) of all capital city auctions, up 26.8% from the previous week. Its preliminary clearance rate slumped 7.0 percentage points to 56.3%, the weakest in three weeks. Auction volumes are set to fall sharply this week, with around 280 currently scheduled because of the AFL Grand Final long weekend.

Across Sydney, 577 homes went to auction, a 5.3% rise in auction volumes on the week, though that was 36.9% fewer than a year ago. Auction activity is expected to rise sharply this week, with about 935 homes currently scheduled to go under the hammer. If all the scheduled auctions proceed, it would be the highest weekly auction volume since late May, when 977 were held. The preliminary clearance rate was 54.2%, down 5.4 percentage points on the previous week and the lowest early success rate in seven weeks.

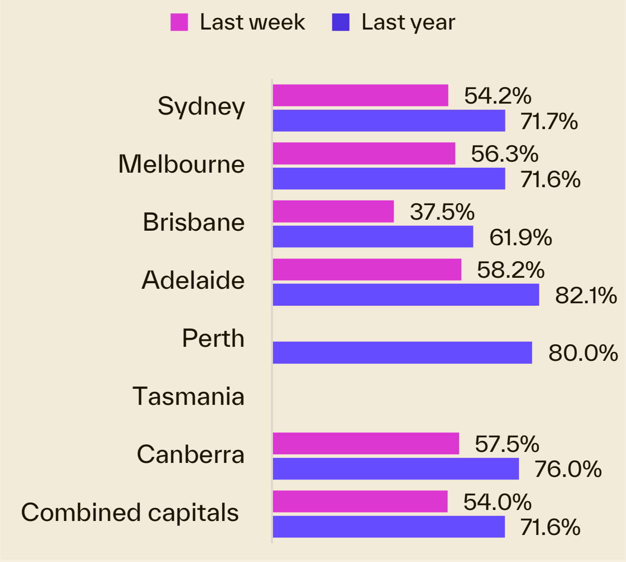
In Brisbane, the preliminary clearance rate was 37.5%, a decline of 4.1 percentage points from the previous week and closely aligned with the winter average of 37.2%. Auction volumes rose 3.0% to 174, up 1.8% from the same week last year. Adelaide experienced a significant 43% increase in auction volumes, reaching 113 auctions. The preliminary clearance rate also improved, rising by 2.6 percentage points to 58.2%, the city's strongest early result in five weeks.

In Canberra, 58 auctions were held, consistent with the previous week but 44% lower than the corresponding week last year. The preliminary clearance rate increased by 10.6 percentage points to 57.5%, positioning it 12.1 percentage points above the winter average of 45.4%.

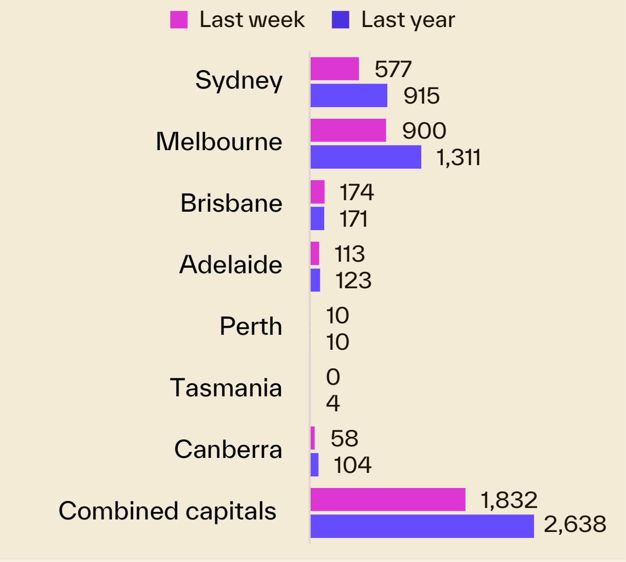
Ten auctions were held in Perth, half of them reporting a successful result so far, while Tasmania had none.

Capital City Auction Statistics (Preliminary)

Clearance rate



Total auctions



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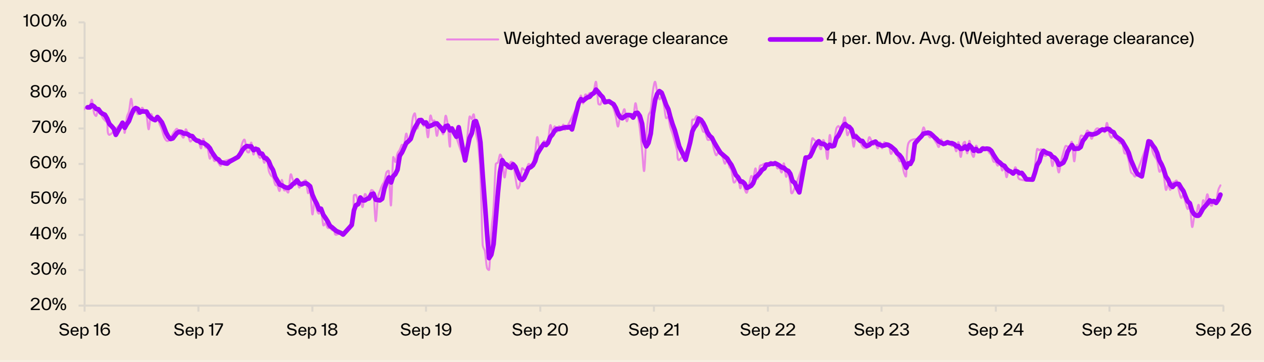
Property Market Indicator Summary

Capital City Auction Statistics (Preliminary)

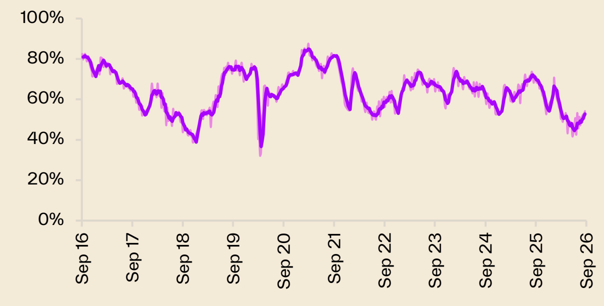
City	Clearance rate	Total auctions	Cotality auction results	Cleared auctions	Uncleared auctions
Sydney	54.2%	577	417	226	191
Melbourne	56.3%	900	714	402	312
Brisbane	37.5%	174	120	45	75
Adelaide	58.2%	113	55	32	23
Perth	n.a.	10	8	4	4
Tasmania	n.a.	0	0	0	0
Canberra	57.5%	58	40	23	17
Combined capitals	54.0%	1,832	1,354	731	623

Weekly clearance rates

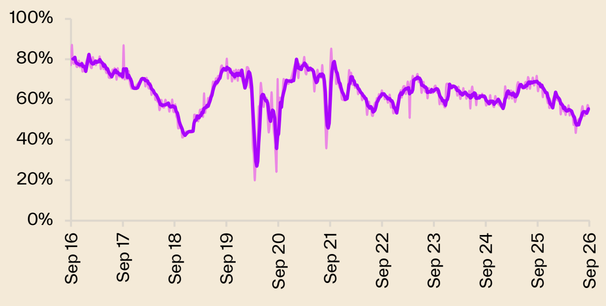
Combined capital cities



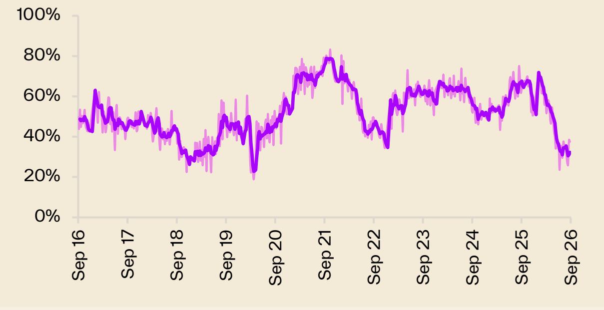
Sydney



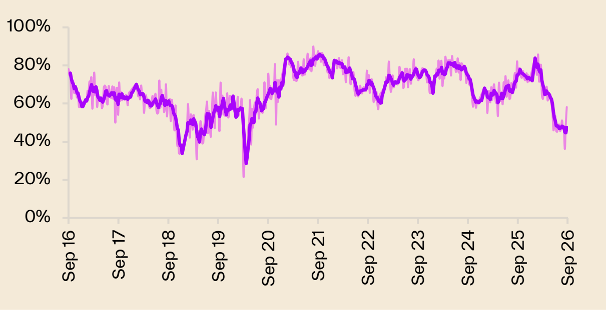
Melbourne



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	54.6%	17	11	6	5
Baulkham Hills and Hawkesbury	45.5%	19	11	5	6
Blacktown	25.0%	31	12	3	9
City and Inner South	63.0%	64	54	34	20
Eastern Suburbs	49.0%	57	49	24	25
Inner South West	60.4%	67	48	29	19
Inner West	56.4%	51	39	22	17
North Sydney and Hornsby	57.8%	87	64	37	27
Northern Beaches	61.5%	37	26	16	10
Outer South West	n.a.	4	3	0	3
Outer West and Blue Mountains	n.a.	2	1	0	1
Parramatta	59.1%	37	22	13	9
Ryde	48.7%	54	39	19	20
South West	53.3%	23	15	8	7
Sutherland	43.5%	27	23	10	13
Melbourne sub-regions					
Inner	61.5%	136	117	72	45
Inner East	52.9%	117	102	54	48
Inner South	64.0%	108	86	55	31
North East	63.7%	118	102	65	37
North West	48.8%	108	84	41	43
Outer East	52.9%	64	51	27	24
South East	58.6%	107	70	41	29
West	45.1%	126	91	41	50
Mornington Peninsula	54.6%	16	11	6	5
Regional SA4					
Newcastle and Lake Macquarie	n.a.	16	9	5	4
Illawarra	n.a.	11	6	6	0
Gold Coast	40.7%	49	27	11	16
Sunshine Coast	58.8%	113	17	10	7
Geelong	n.a.	9	8	4	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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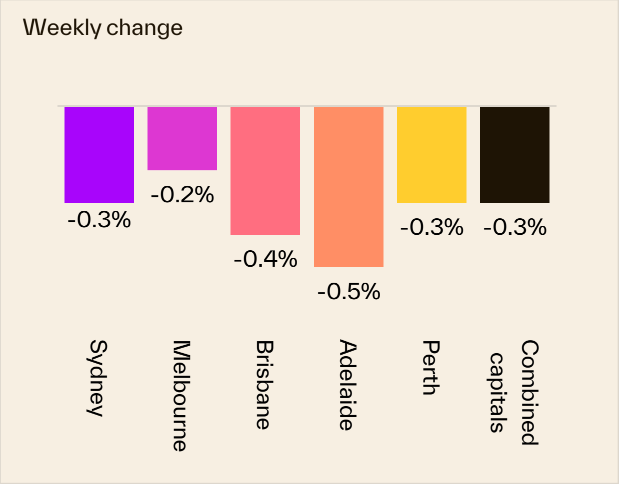
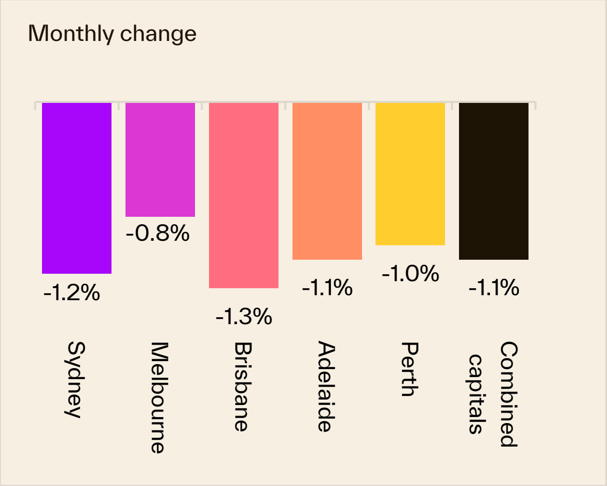
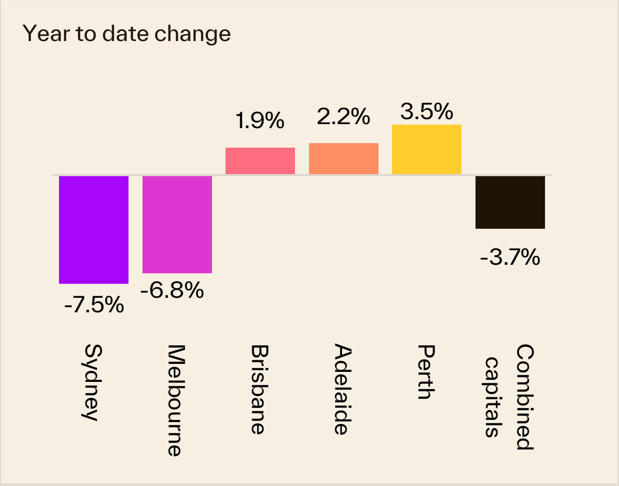
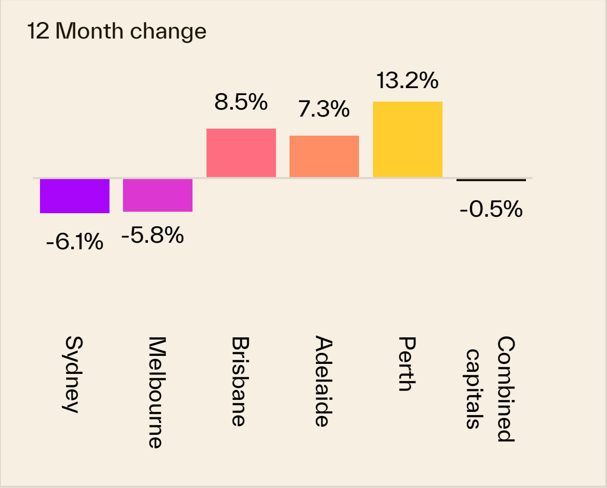
Property Market Indicator Summary

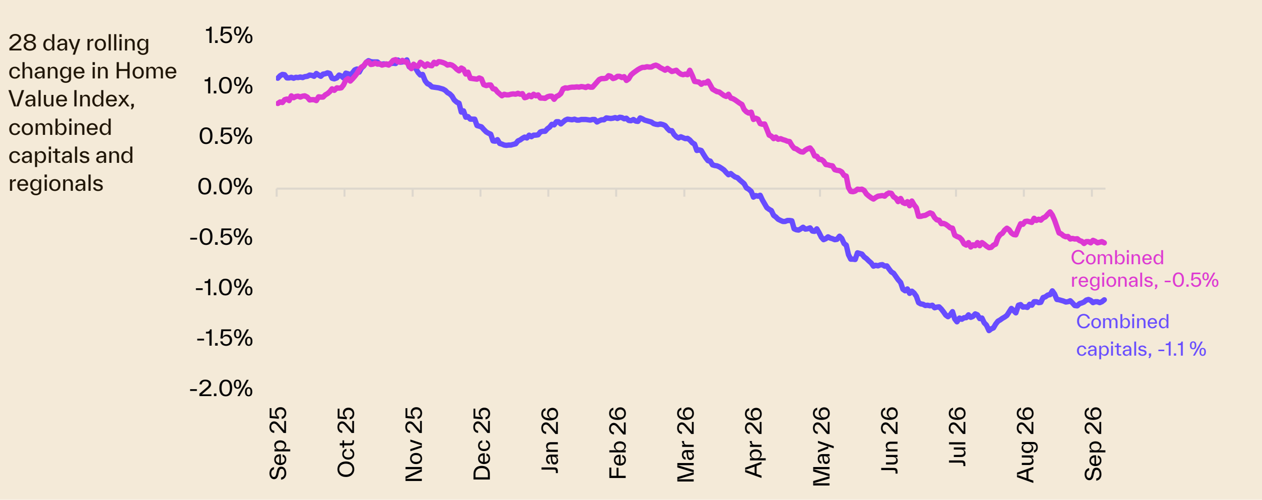
Capital city home value changes











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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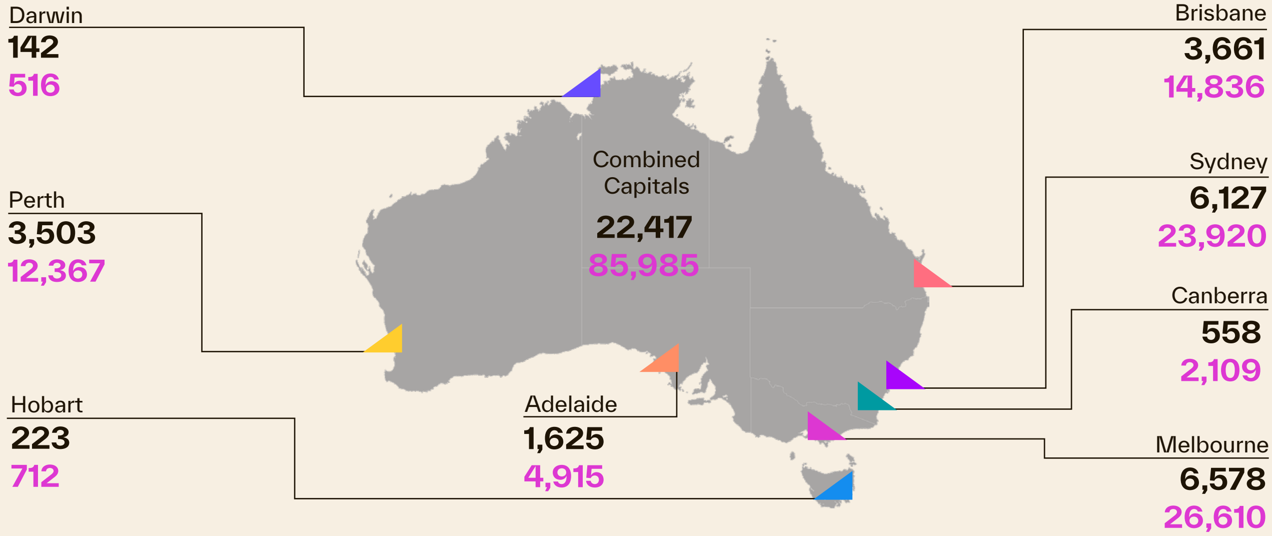
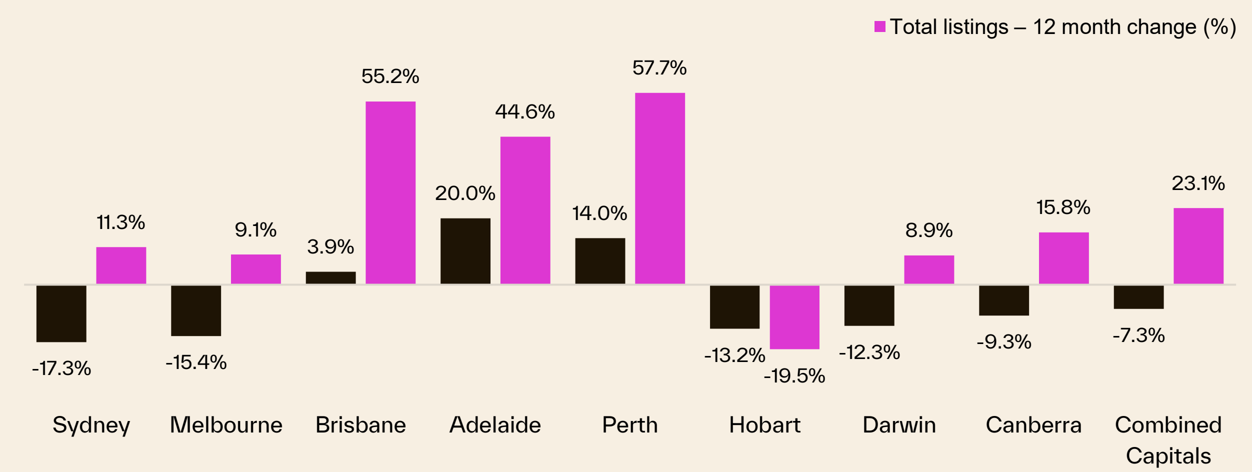
Property Market Indicator Summary

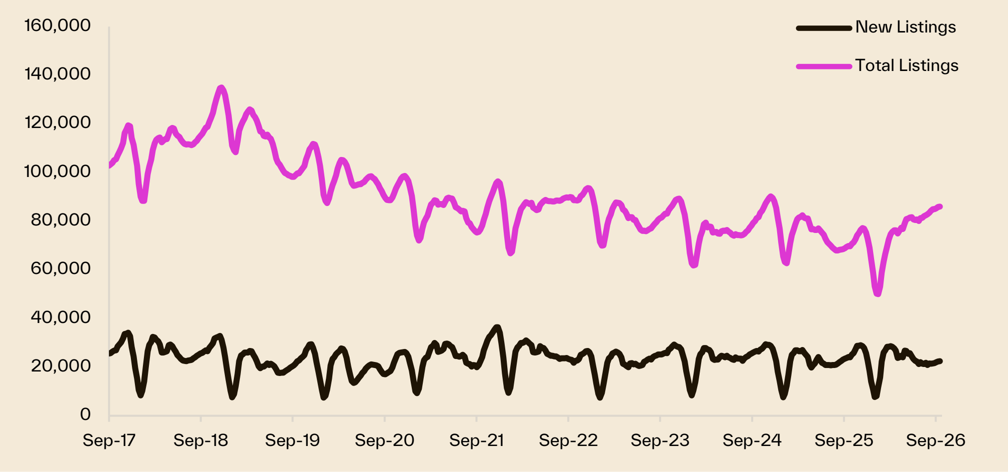
Capital city properties listed for sale — four week count



Listings — 12 month change (%)



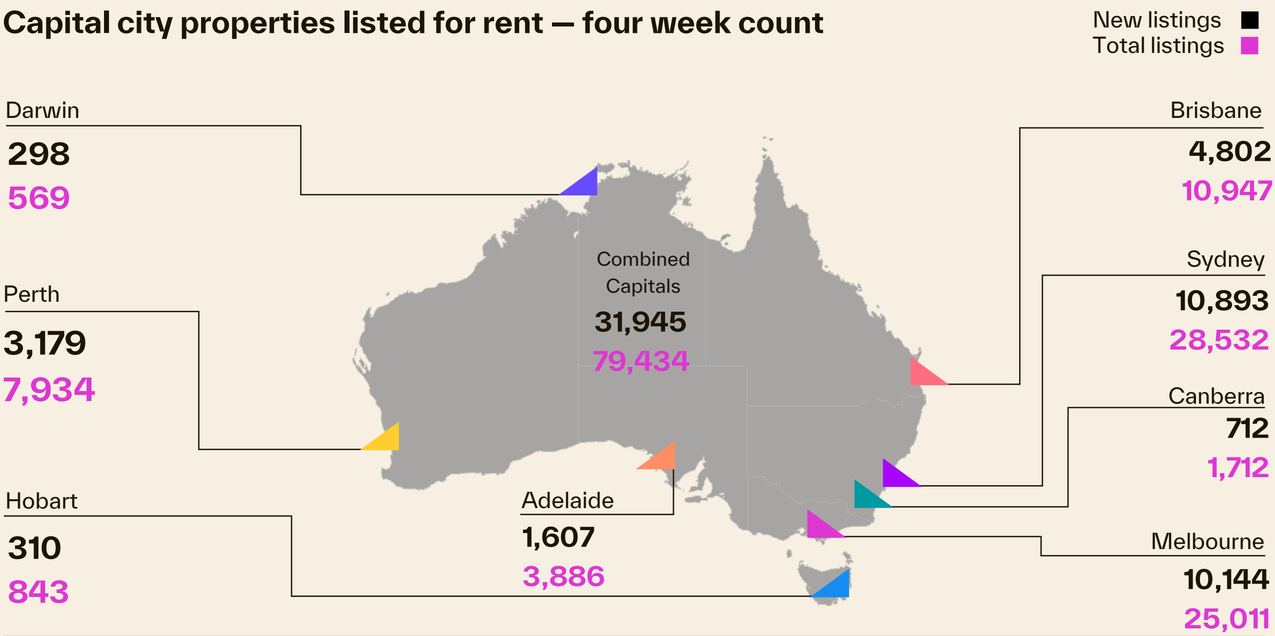
Number of homes for sale, combined capital cities



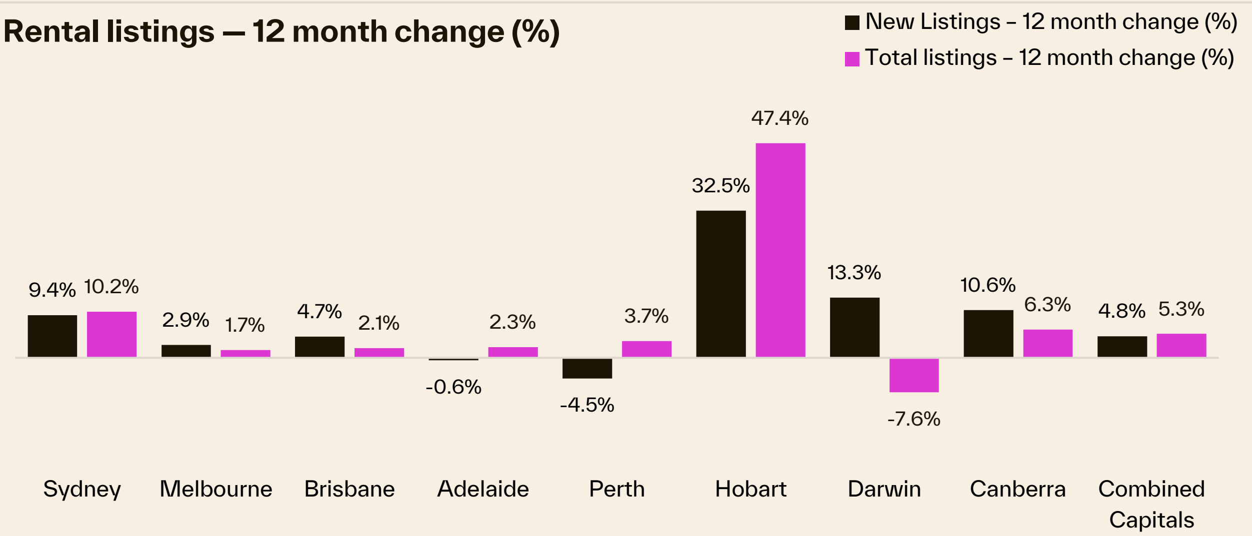
These results are calculated across properties that have been advertised for sale over the 28 days ending 20 September 2026. A new listing is one which has not been previously advertised for sale within 75 days, total listings include new listings and properties which have been previously advertised.

Property Market Indicator Summary

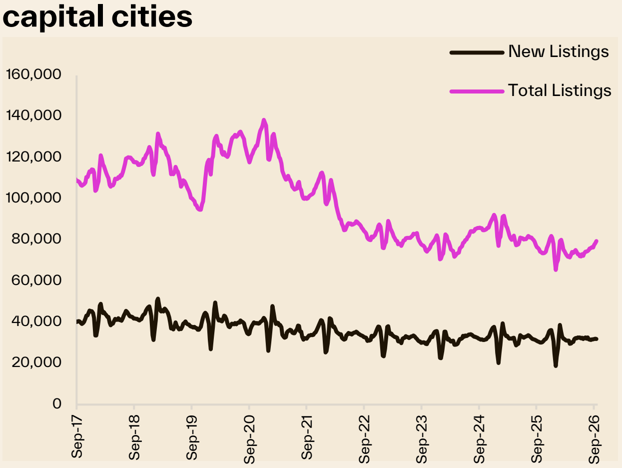
Capital city properties listed for rent — four week count



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%**

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Property Market Indicator Summary

Top two sales over the past week, states and territories

New South Wales

28 Barker Road
Strathfield

5 5 4

$7,900,000

Richard Matthews Real Estate

19 Sanders Parade
Concord

5 5 2

$5,690,000

McGrath Strathfield

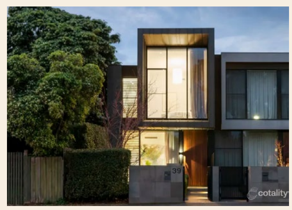
Victoria

31 Montalto Avenue
Toorak

5 2 2

$6,000,000

Fletchers Canterbury



1/39 Oxley Road
Hawthorn

5 4 2

$4,500,000

Ray White Hawthorn

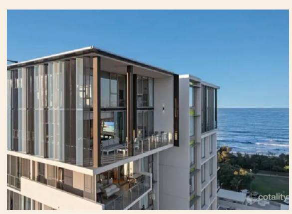
Queensland

22 Hilda Street
Mermaid Beach

4 3 2

$4,875,000

Kollosche



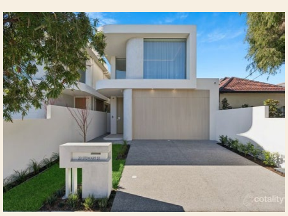
1105/67 Sixth Avenue
Maroochydore

4 3 3

$3,775,000

Ray White Maroochydore

South Australia

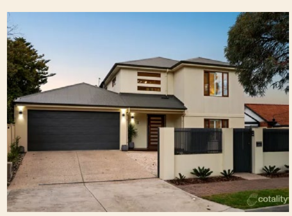


20 Stewart Street
Henley Beach

4 3 2

$2,900,000

Ray White Henley Beach



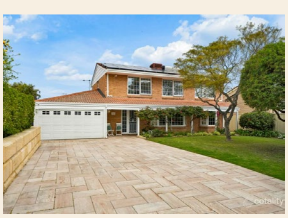
25 North Street
Henley Beach

4 3 2

$2,360,000

Harris Real Estate Blackwood

Western Australia



14 Camelot Street
Carine

5 3 2

$1,928,000

Realmark North Coastal

22 Karoonda Road
Booragoon

4 2 6

$1,850,000

The Agency

Property Market Indicator Summary

Top two sales over the past week, states and territories

Tasmania

52 Hollyhock Drive
Kingston

4 2 2

$1,110,000

Harcourts Kingborough

4 Watton Place
Howrah

3 3 1

$1,055,000

Arkley & Co

Northern Territory

35 Wanguri Terrace
Wanguri

4 2 2

$881,000

Ray White Darwin

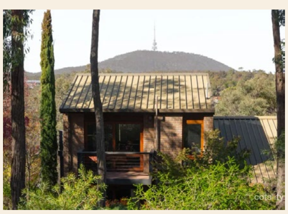
65 Wellington Parade
Alawa

4 1 2

$778,000

Ray White Darwin

Australian Capital Territory

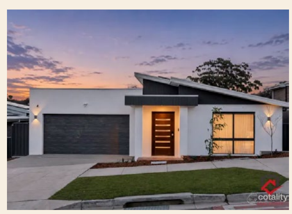


48 Jaeger Circuit
Bruce

5 3 2

$2,010,000

HOME.BYHOLLY



33 Wake Crescent
J

4 3 2

$1,325,000

Confidence Real Estate

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Property Market Indicator Summary

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