

Property Market Indicator Summary

All data to week ending 27 July 2025

Highest preliminary clearance rate since July last year

Auction markets saw a near 14% rise in activity last week relative to the week prior, with 1,774 capital city homes taken under the hammer, up from 1,561 the previous week.

The capital's preliminary auction clearance rate also moved higher, reaching 74.7% last week, the highest early clearance rate since the first week of July last year.

Melbourne was the busiest auction market last week, with 837 homes taken to auction, a 25% jump in activity compared with the week prior (671). The preliminary clearance rate held reasonably firm from the previous week's two year high, slipping slightly from 76.7% to 76.3%. This was the fifth time in six weeks the preliminary clearance rate for Melbourne has held above 75% and the 13th straight week of 70%+ early clearance rates.

The volume of auctions held relatively steady in Sydney, with 601 homes taken to auction last week, up 2.7% on the previous week when 585 auctions were held. Sydney's clearance rate trend hasn't been as strong as Melbourne's. Although down one percentage point from the week prior (74.8%), at

73.8%, last week was the 7th consecutive week of 70%+ preliminary clearance rates across Sydney.

There were 190 auctions held in Brisbane last week, up from 154 the week prior and the highest volume seen since the last week of May (205). The preliminary clearance rate, at 74.5%, was Brisbane's second highest so far this year after the last week of June at 76.1%.

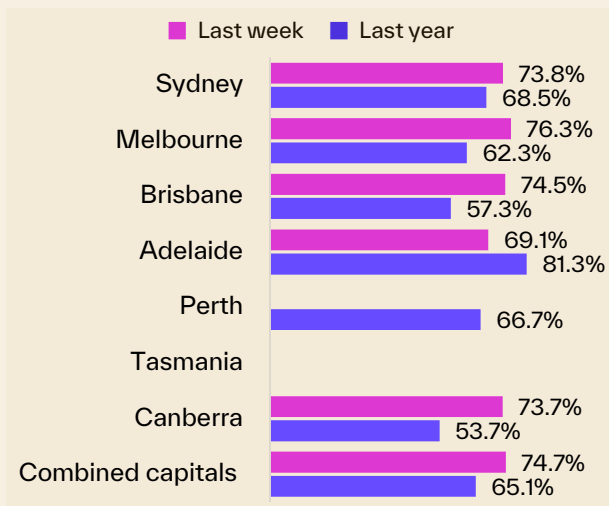
Adelaide hosted 86 auctions last week, in-line with the week prior (also 86). The preliminary clearance rate edged below the 70% mark for the first time in two weeks, coming in at 69.1% last week.

In Canberra, 49 homes were auctioned last week, the lowest volume of auctions since the last week of April (30). 73.7% of homes have sold based on results collected so far, the highest preliminary clearance rate for the ACT since the week ending March 9th earlier this year.

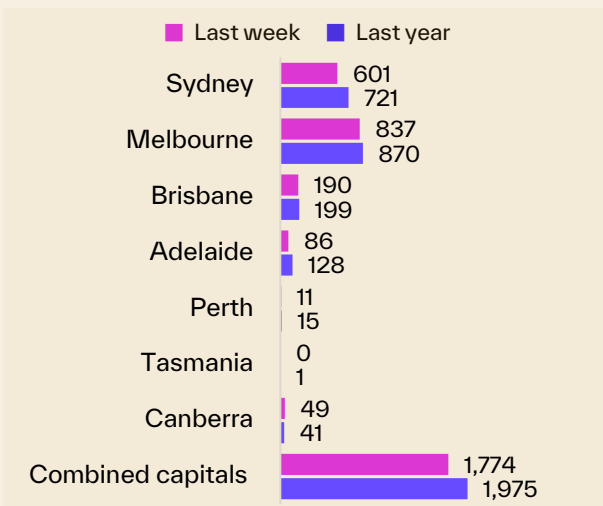
The volume of auctions is set to reduce this week with approximately 1,600 homes currently scheduled for auction across the combined capitals.

Capital City Auction Statistics (Preliminary)

Clearance rate



Total auctions



Media enquiries: media@cotality.com

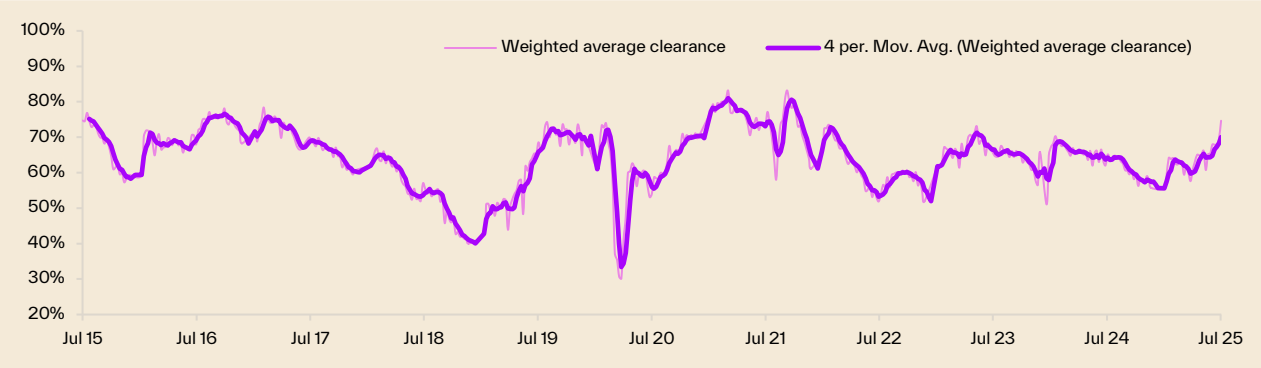
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Capital City Auction Statistics (Preliminary)

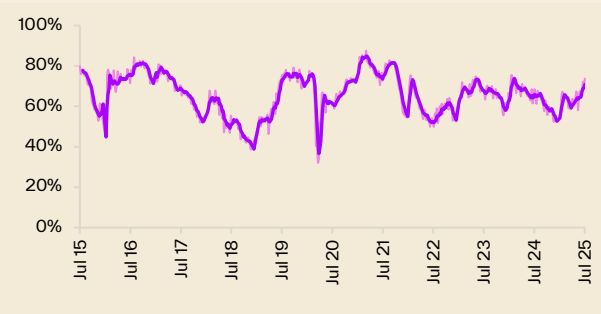
City	Clearance rate	Total auctions	Cotality auction results	Cleared auctions	Uncleared auctions
Sydney	73.8%	601	431	318	113
Melbourne	76.3%	837	628	479	149
Brisbane	74.5%	190	145	108	37
Adelaide	69.1%	86	55	38	17
Perth	n.a.	11	6	3	3
Tasmania	n.a.	0	0	0	0
Canberra	73.7%	49	38	28	10
Weighted Average	74.7%	1,774	1,303	973	330

Weekly clearance rates

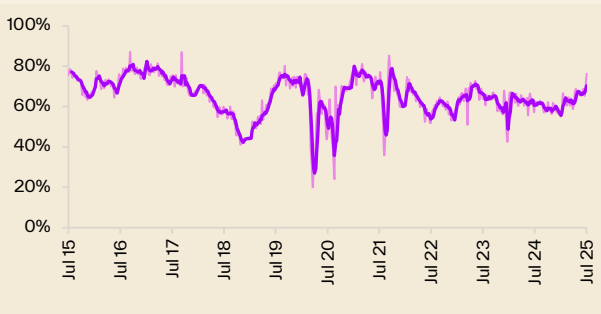
Combined capital cities



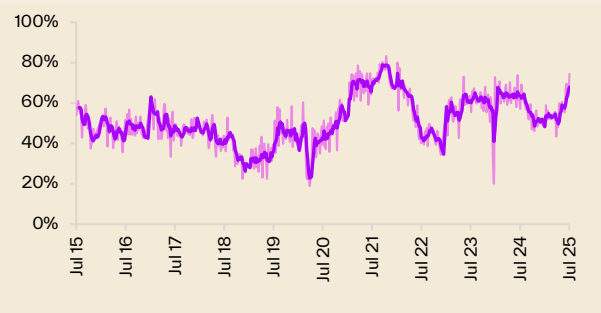
Sydney



Melbourne



Brisbane



Adelaide



Property Market Indicator Summary

Sub-region auction statistics (Preliminary)

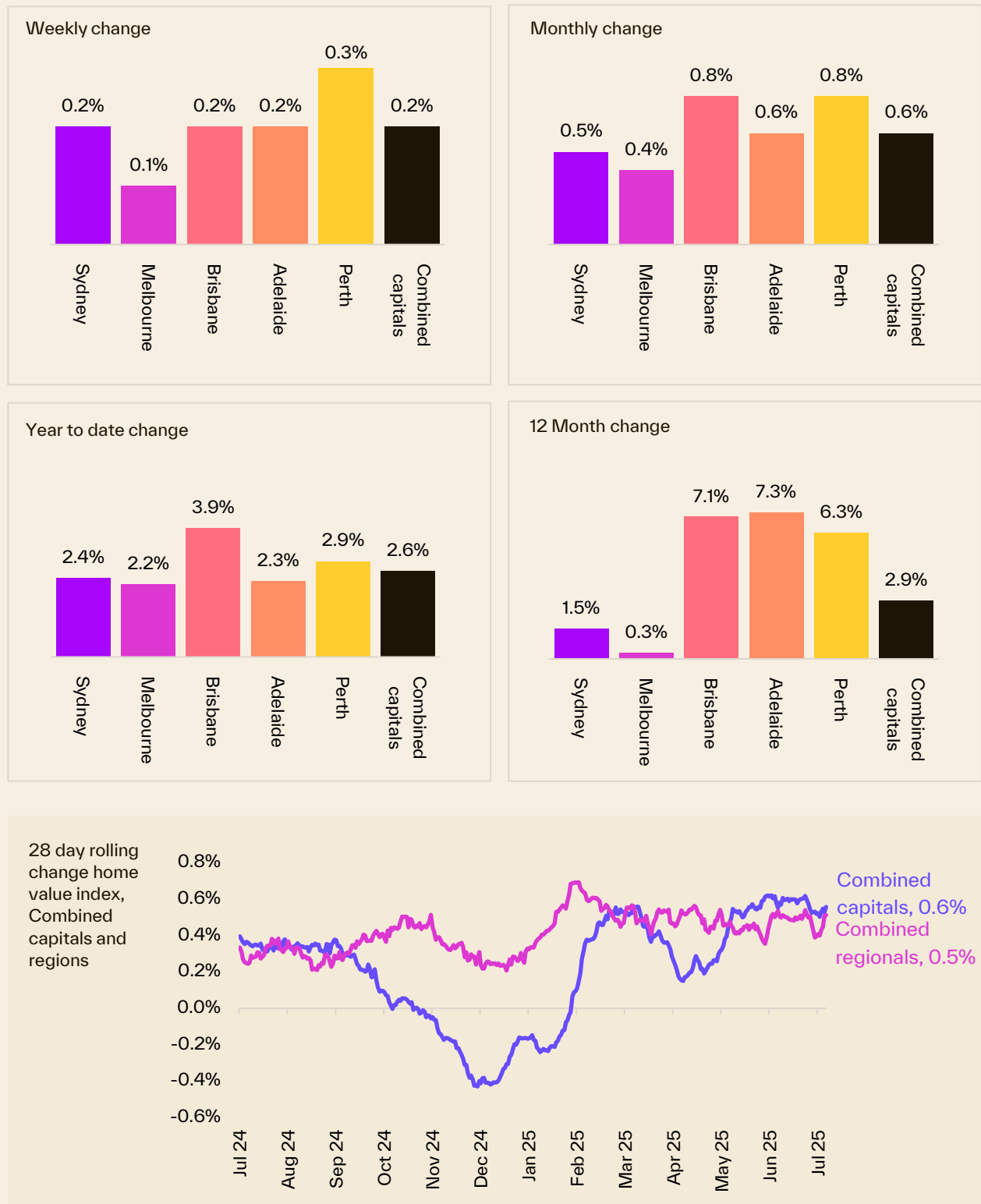
Region	Clearance rate	Total auctions	Collected results	Cleared auctions	Uncleared auctions
Sydney sub-regions					
Central Coast	54.6%	17	11	6	5
Baulkham Hills and Hawkesbury	75.0%	43	24	18	6
Blacktown	60.0%	52	20	12	8
City and Inner South	79.2%	57	48	38	10
Eastern Suburbs	77.8%	19	18	14	4
Inner South West	80.7%	76	62	50	12
Inner West	67.5%	55	40	27	13
North Sydney and Hornsby	66.1%	75	59	39	20
Northern Beaches	76.9%	27	26	20	6
Outer South West	n.a.	8	7	4	3
Outer West and Blue Mountains	n.a.	6	4	2	2
Parramatta	80.6%	53	36	29	7
Ryde	91.7%	39	24	22	2
South West	65.5%	45	29	19	10
Sutherland	78.3%	30	23	18	5
Melbourne sub-regions					
Inner	67.1%	97	70	47	23
Inner East	73.9%	87	65	48	17
Inner South	70.5%	106	78	55	23
North East	81.6%	125	98	80	18
North West	82.7%	116	81	67	14
Outer East	77.6%	57	49	38	11
South East	83.5%	121	85	71	14
West	71.6%	112	88	63	25
Mornington Peninsula	71.4%	16	14	10	4
Regional SA4					
Newcastle and Lake Macquarie	62.5%	20	16	10	6
Illawarra	72.7%	13	11	8	3
Gold Coast	53.1%	78	64	34	30
Sunshine Coast	58.8%	44	34	20	14
Geelong	n.a.	8	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

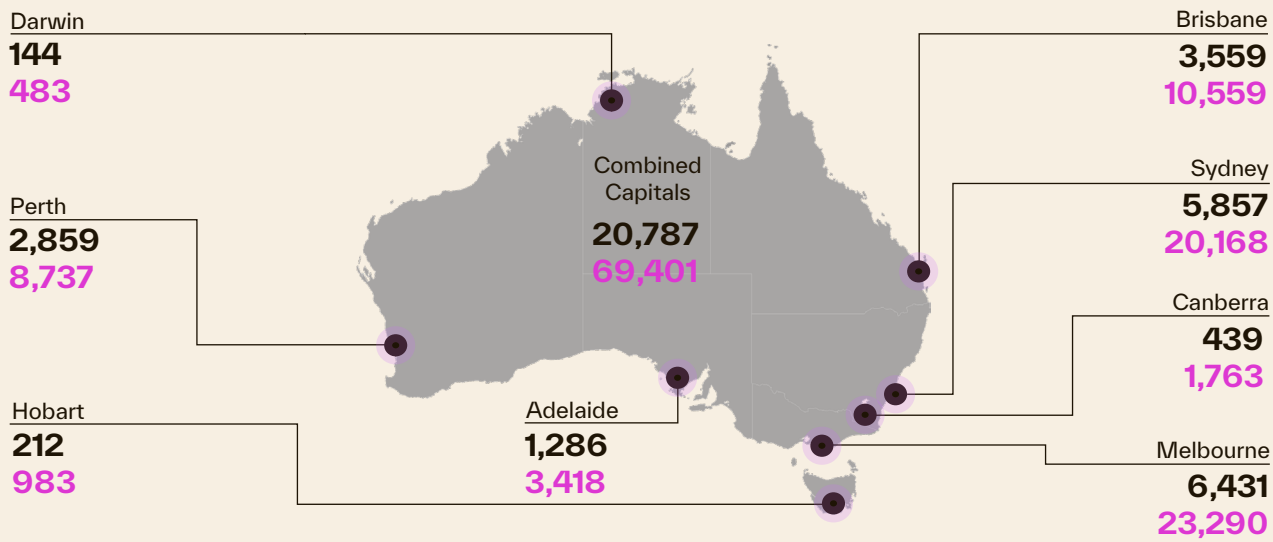


Results are based on the Cotality Daily Home Value Index. Further information and daily updates on the index results are available from <https://www.cotality.com/au/our-data/indices>.

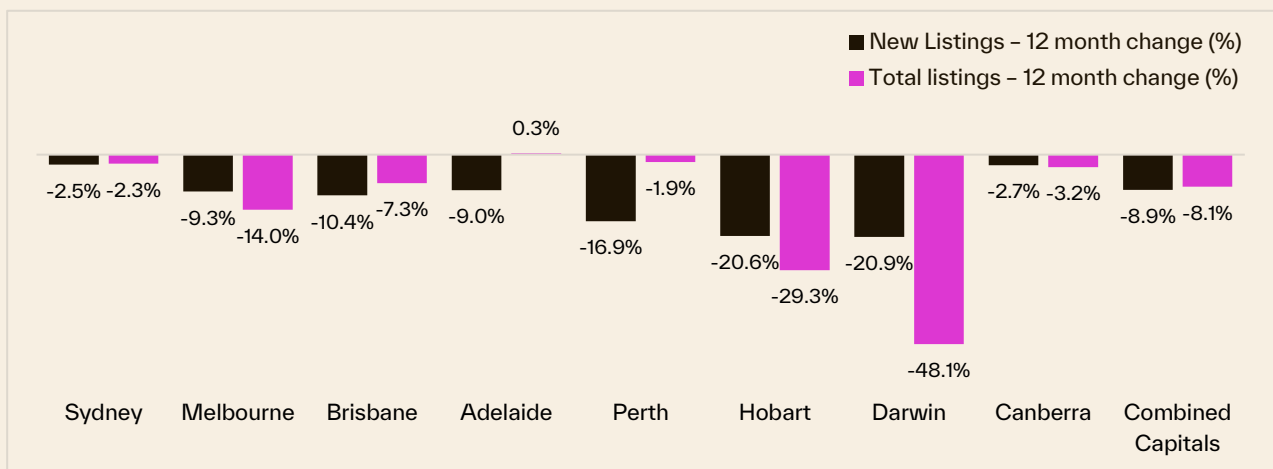
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Property Market Indicator Summary

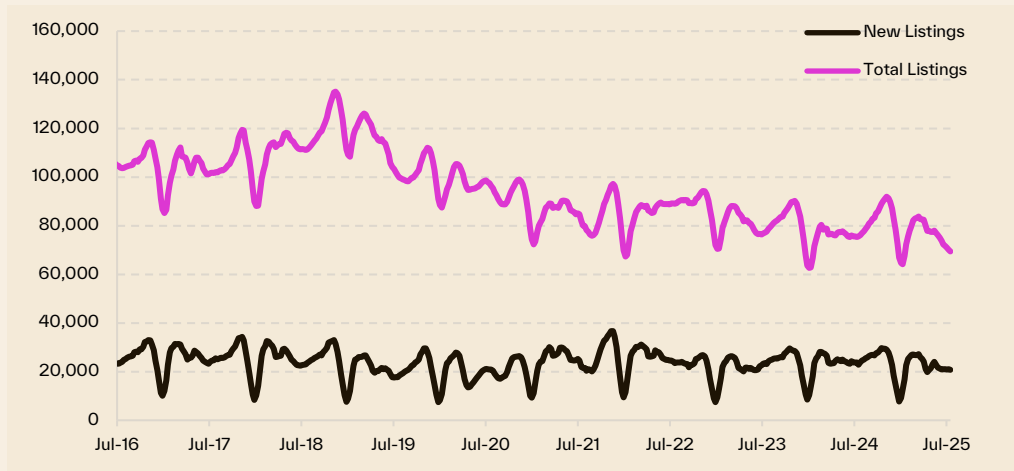
Capital city properties listed for sale – four week count



Listings – 12 month change (%)



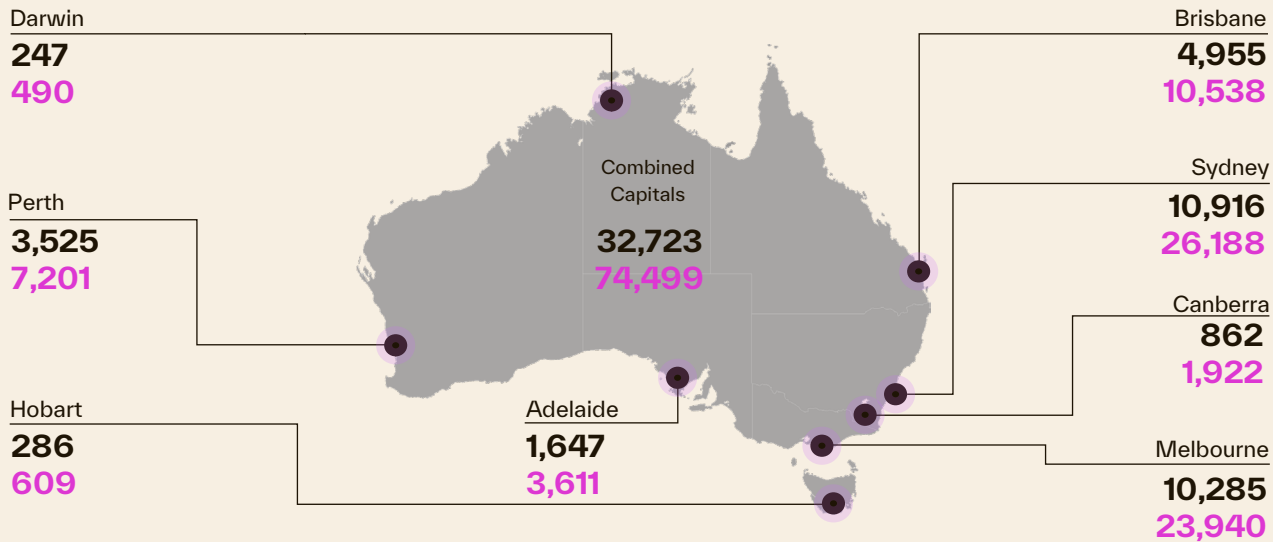
Number of homes for sale, combined capital cities



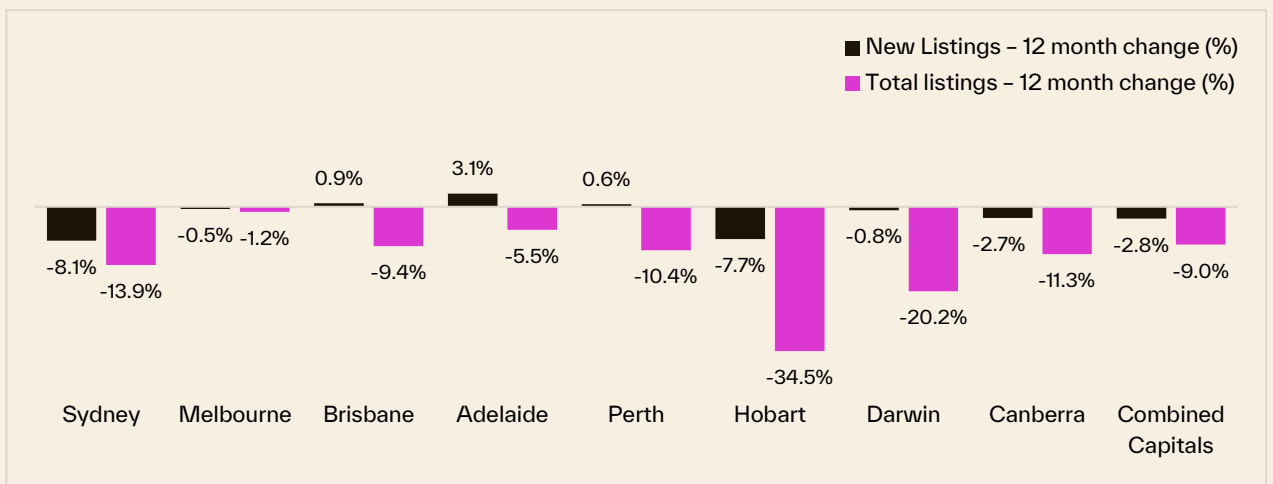
These results are calculated across properties that have been advertised for sale over the 28 days ending 27 July 2025. A new listing is one which has not been previously advertised for sale within 75 days, total listings include new listings and properties which have been previously advertised.

Property Market Indicator Summary

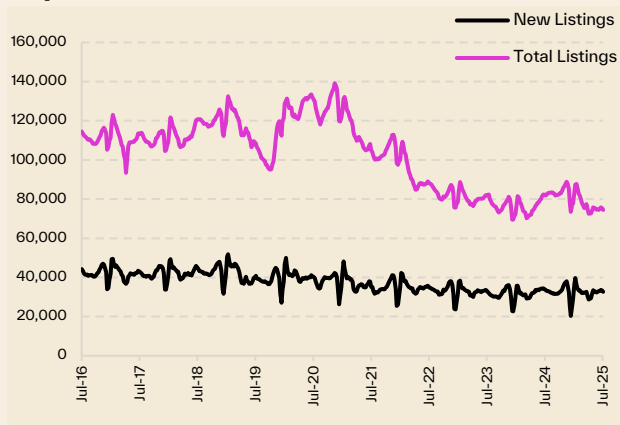
Capital city properties listed for rent – four week count



Rental listings – 12 month change (%)



Number of homes for rent, combined capital cities



Rental snapshot – data to June 2025

		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	\$796	0.3%	1.5%	1.9%	3.1%	3.1%	1.8%	2.1%
Melbourne	\$613	0.2%	0.7%	1.2%	3.7%	3.6%	1.4%	1.3%
Brisbane	\$687	0.6%	2.0%	3.8%	3.7%	3.8%	1.7%	1.9%
Adelaide	\$629	0.2%	0.7%	4.7%	3.7%	3.8%	0.9%	0.9%
Perth	\$721	0.3%	1.1%	4.9%	4.3%	4.3%	1.2%	1.4%
Hobart	\$581	0.4%	1.3%	5.3%	4.4%	4.2%	1.5%	3.1%
Darwin	\$659	1.4%	2.9%	6.2%	6.5%	6.5%	1.5%	1.7%
Canberra	\$677	0.3%	0.3%	1.6%	4.1%	4.0%	1.6%	1.9%
Combined capitals	\$696	0.3%	1.3%	2.7%	3.5%	3.5%	1.5%	1.7%
Combined regionals	\$584	0.4%	1.5%	5.3%	4.4%	4.4%	1.6%	1.9%
National	\$665	0.3%	1.3%	3.4%	3.7%	3.7%	1.6%	1.7%

Property Market Indicator Summary

Top two sales over the past week, states and territories

New South Wales



**16 Trafalgar Street
Bronte**

 **4**  **2**  **0**

\$10,000,000

PPD Real Estate



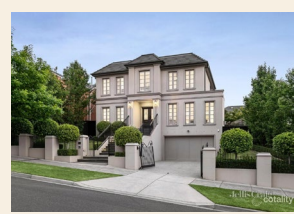
**2-4 Cotswold Road
Strathfield**

 **4**  **2**  **3**




\$4,910,000

McGrath Strathfield

Victoria

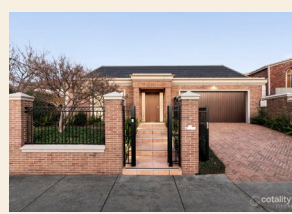


**6 Bernard Street
Balwyn North**

 **5**  **5**  **4**

\$3,968,000

Jellis Craig Hawthorn



**9 Macedon Avenue
Balwyn North**

 **4**  **3**  **2**

\$2,975,000

Fletchers - Balwyn North

Queensland

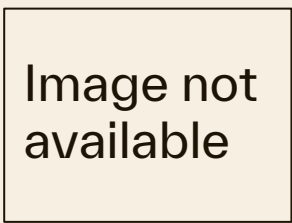


**75 Langshaw Street
New Farm**




 **4**  **2**  **3**

\$5,450,000

Ray White New Farm



**4 Ethel Street
Camp Hill**

 **5**  **3**  **3**




\$4,700,000

Ray White Bulimba

South Australia

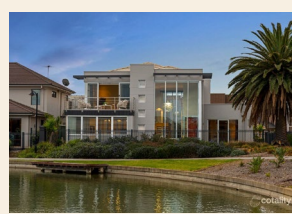


**18 East Parkway
Colonel Light Gardens**

 **3**  **1**  **9**

\$1,850,000

Raine & Horne Unley



**50 Isla Circuit
Mawson Lakes**

 **4**  **2**  **2**



\$1,760,000

LJ Hooker Property Specialists

Western Australia



**44 Oceanside Promenade
Mullaloo**

 **4**  **4**  **2**

\$4,200,000

Haiven Property



**47 Aztec Island Retreat
Halls Head**

 **4**  **4**  **2**

\$3,200,000

Sauvage Properties

Property Market Indicator Summary

Top two sales over the past week, states and territories

Tasmania



**183 Bathurst Street
Hobart**

 **4**  **2**  **1**

\$1,300,000

Elders Tasmania



**3 Ginseng Court
Kingston**

 **4**  **2**  **4**

\$1,043,000

Petrusma Property

Northern Territory



**13 Blackburn Street
Muirhead**

 **3**  **2**  **2**

\$764,000

Ray White Darwin



**42 Greenwood Crescent
Moil**

 **4**  **2**  **4**

\$715,000

Billy Nida Realty

Australian Capital Territory



**68 Jennings Street
Curtin**

 **5**  **3**  **3**

\$2,700,000

Hayman Partners



**128 Duffy Street
Ainslie**

 **4**  **2**  **1**

\$1,900,000

Town Residential

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