

Property Market Indicator Summary

All data to week ending 14 September 2025

Clearance rates wilt as auction activity ramps up

The spring selling season is gathering momentum, with 2,455 homes taken to auction last week, the highest volume since the first week of June.

Preliminary clearance rates eased off a little through the first two weeks of spring, suggesting demand isn't quite keeping up with the additional supply of stock coming to market. Continuing the subtle easing seen the week prior, the combined capitals early success rate dipped to 74.8% last week, falling below the 75% mark for the first time in five weeks.

Despite the subtle easing in the preliminary clearance rate, at 74.8%, the early clearance rate is still a strong result, beating the winter average of 72.7%.

Auction activity across Melbourne held above the 1,000 mark for the third week in a row, with 1,273 auctions held across city. Compared to the previous week, last week's numbers were up 17.3% and was 9.4% higher than the same week last year. Bucking the broader trend, Melbourne's preliminary clearance rate rose to 75.2% last week, up from 73.2% the week prior.

837 homes were taken to auction in Sydney last week, the highest weekly volume since the first week of June, although -4.0% lower than a year ago. At 74.7%, last week was Sydney's lowest preliminary clearance rate in

five weeks, with the early success rate easing for the second week from a recent high of 80.3% in the last week of August.

Brisbane hosted the highest volume of auctions across the smaller capitals, with 148 homes going under the hammer last week, four more than the week prior. While down slightly on the week prior (76.5%), last week was the second week in a row where the preliminary clearance rate has held above the 70% mark at 74.0%.

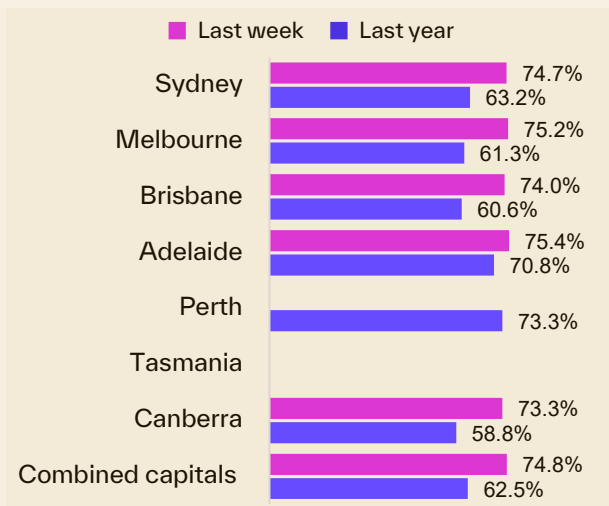
108 auctions were held in Adelaide last week, the highest volume in thirteen weeks. Based on the results collected so far, 75.4% of auctions have returned a successful result — up from 74.5% the week prior and the city's highest preliminary clearance rate since the week ending August 17th.

The ACT hosted its busiest week since late May, with 79 homes auctioned last week. 73.3% of results collected so far have sold, up from 71.9% the previous week.

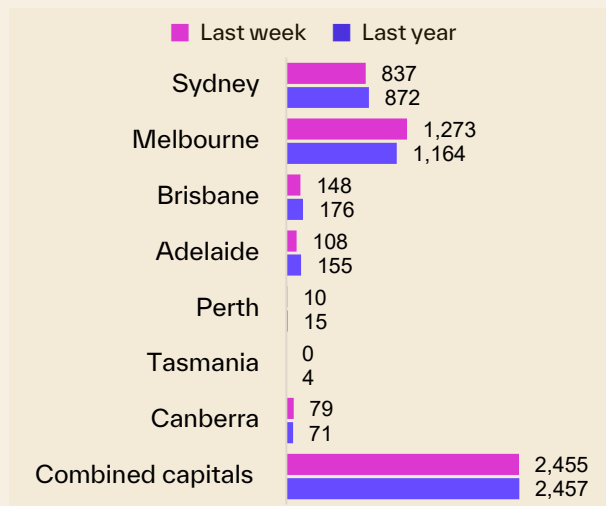
The volume of auctions is set to rise further this week, with around 2,630 homes scheduled to go under the hammer.

Capital City Auction Statistics (Preliminary)

Clearance rate



Total auctions



Media enquiries: media@cotality.com

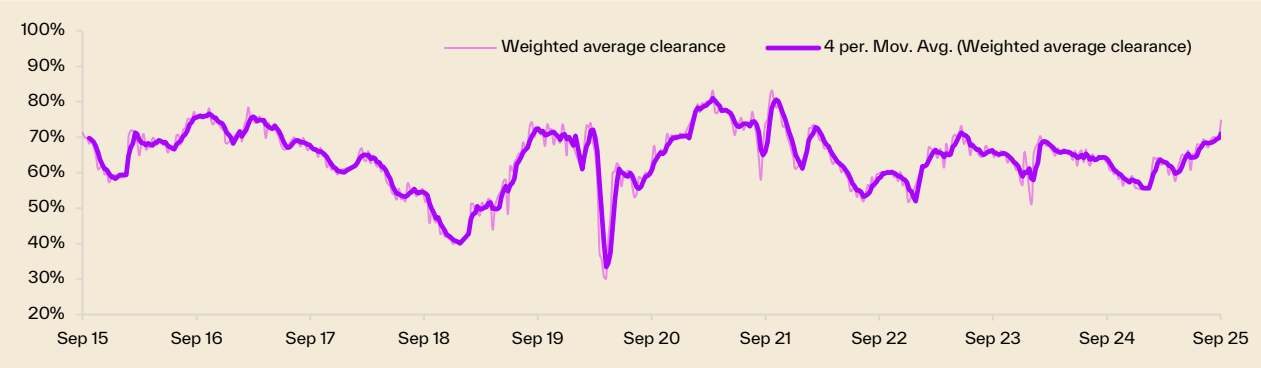
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Capital City Auction Statistics (Preliminary)

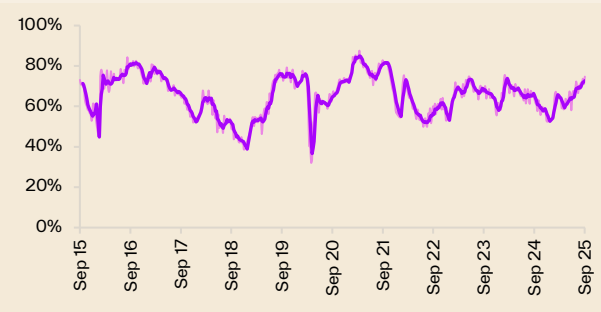
City	Clearance rate	Total auctions	Cotality auction results	Cleared auctions	Uncleared auctions
Sydney	74.7%	837	629	470	159
Melbourne	75.2%	1,273	968	728	240
Brisbane	74.0%	148	104	77	27
Adelaide	75.4%	108	57	43	14
Perth	n.a.	10	6	2	4
Tasmania	n.a.	0	0	0	0
Canberra	73.3%	79	60	44	16
Combined capitals	74.8%	2,455	1,824	1,363	461

Weekly clearance rates

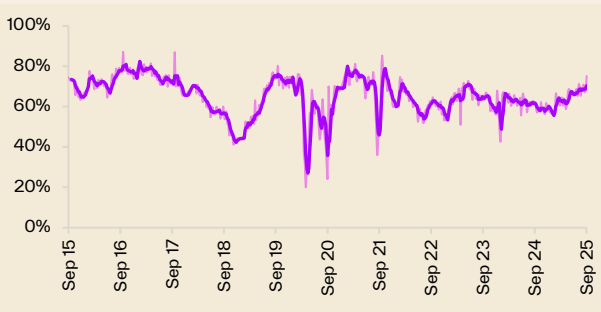
Combined capital cities



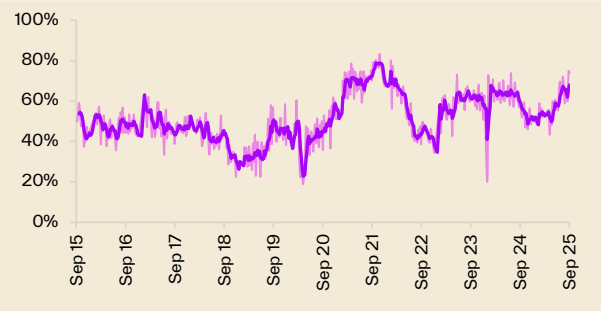
Sydney



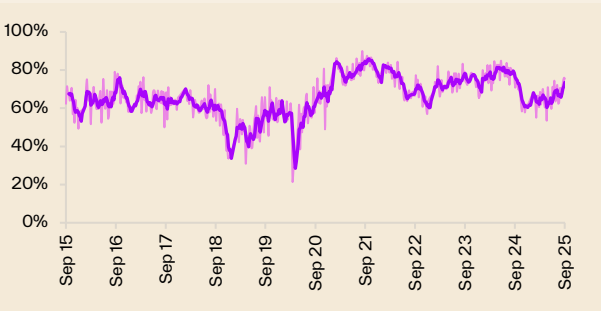
Melbourne



Brisbane



Adelaide



Property Market Indicator Summary

Sub-region auction statistics (Preliminary)

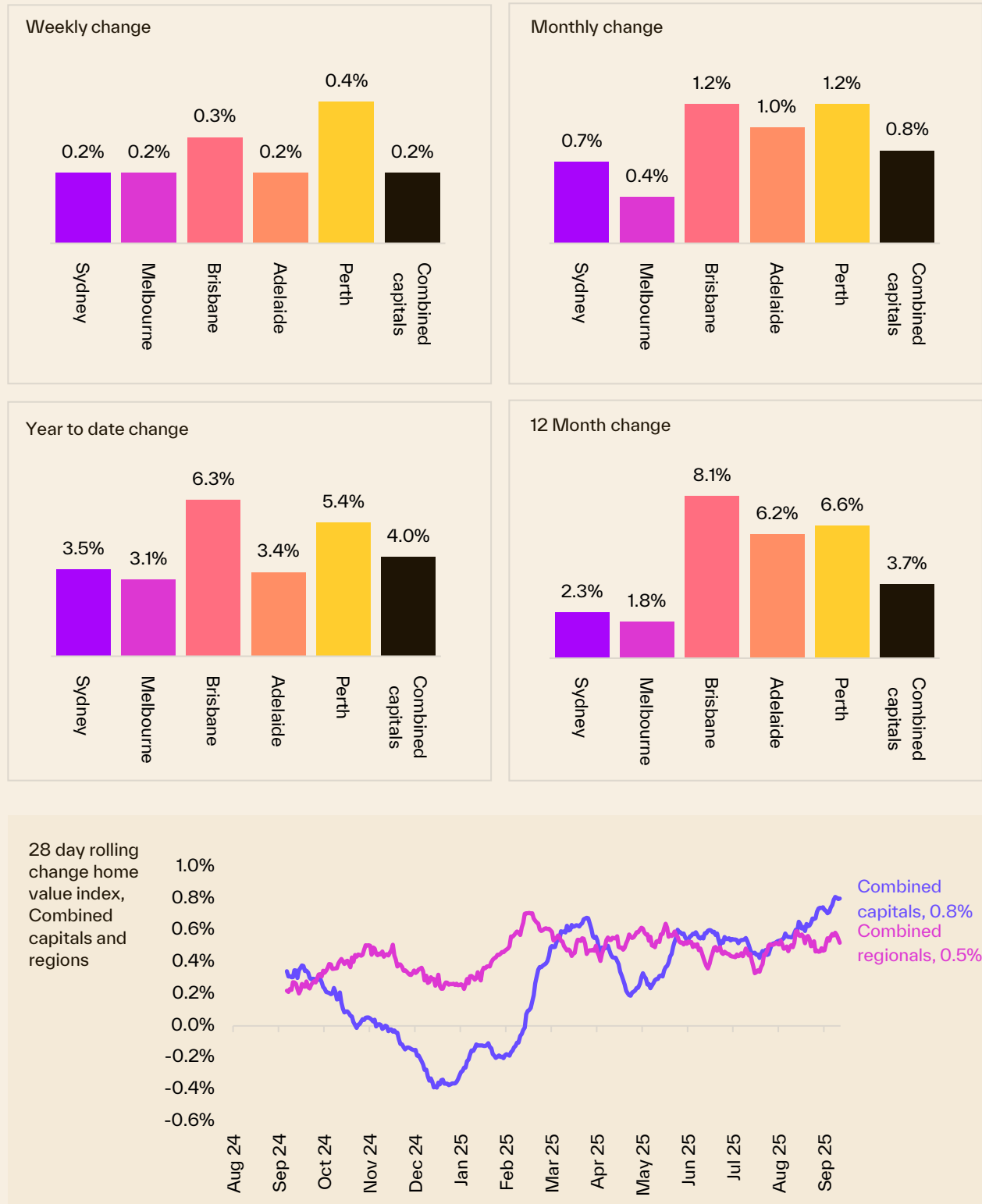
Region	Clearance rate	Total auctions	Collected results	Cleared auctions	Uncleared auctions
Sydney sub-regions					
Central Coast	n.a.	10	6	4	2
Baulkham Hills and Hawkesbury	76.7%	49	30	23	7
Blacktown	81.3%	40	16	13	3
City and Inner South	81.7%	78	71	58	13
Eastern Suburbs	67.1%	88	76	51	25
Inner South West	81.3%	93	80	65	15
Inner West	86.4%	61	44	38	6
North Sydney and Hornsby	74.3%	144	101	75	26
Northern Beaches	61.7%	67	60	37	23
Outer South West	45.5%	13	11	5	6
Outer West and Blue Mountains	n.a.	9	8	5	3
Parramatta	75.6%	67	41	31	10
Ryde	80.0%	45	30	24	6
South West	80.7%	41	31	25	6
Sutherland	66.7%	32	24	16	8
Melbourne sub-regions					
Inner	69.5%	253	187	130	57
Inner East	73.5%	192	147	108	39
Inner South	75.7%	183	148	112	36
North East	75.3%	139	101	76	25
North West	78.6%	124	98	77	21
Outer East	84.6%	87	65	55	10
South East	84.3%	139	102	86	16
West	68.3%	136	104	71	33
Mornington Peninsula	81.3%	20	16	13	3
Regional SA4					
Newcastle and Lake Macquarie	84.6%	20	13	11	2
Illawarra	n.a.	8	4	2	2
Gold Coast	61.1%	47	36	22	14
Sunshine Coast	72.0%	31	25	18	7
Geelong	53.9%	17	13	7	6

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

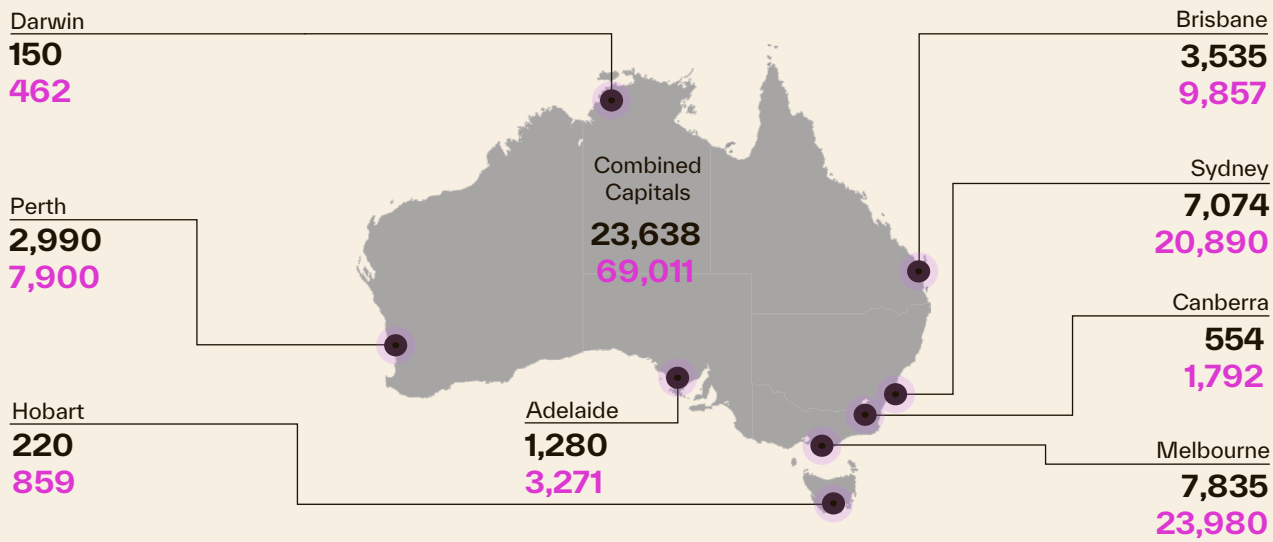


Results are based on the Cotality Daily Home Value Index. Further information and daily updates on the index results are available from <https://www.cotality.com/au/our-data/indices>.

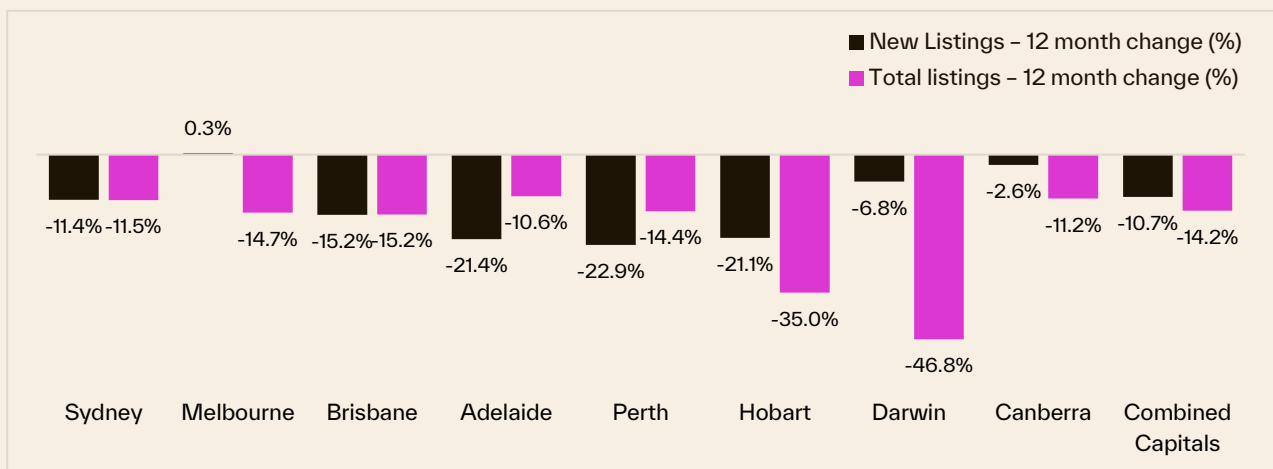
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Property Market Indicator Summary

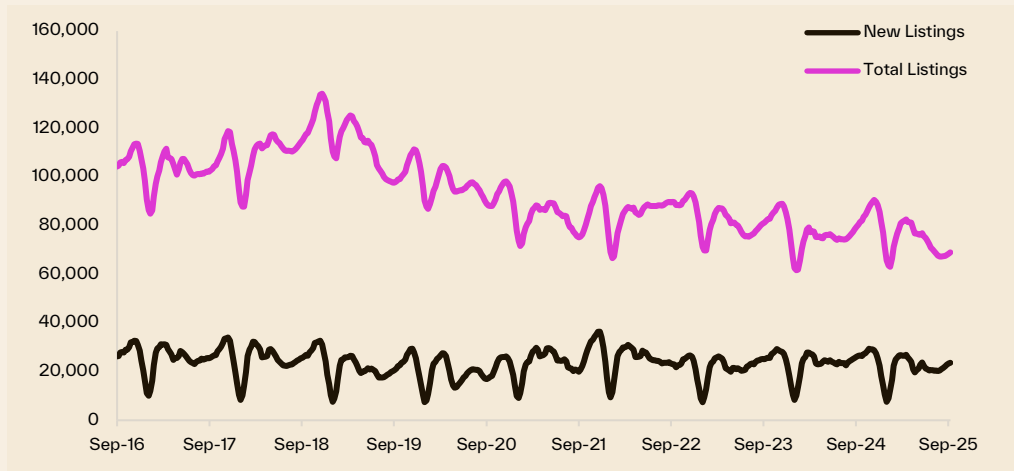
Capital city properties listed for sale – four week count



Listings – 12 month change (%)



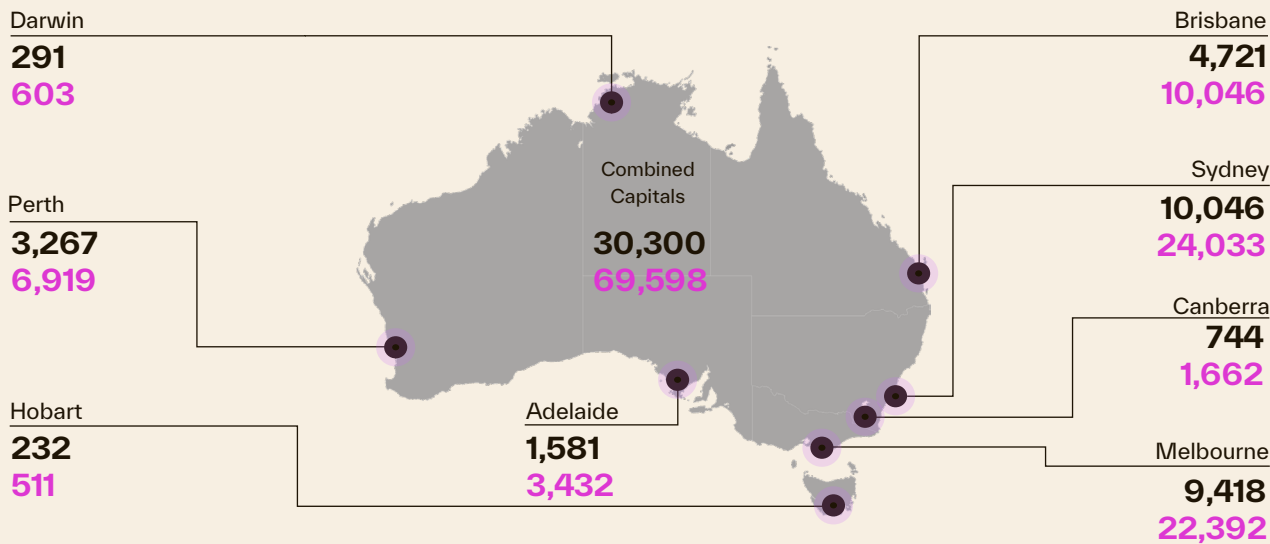
Number of homes for sale, combined capital cities



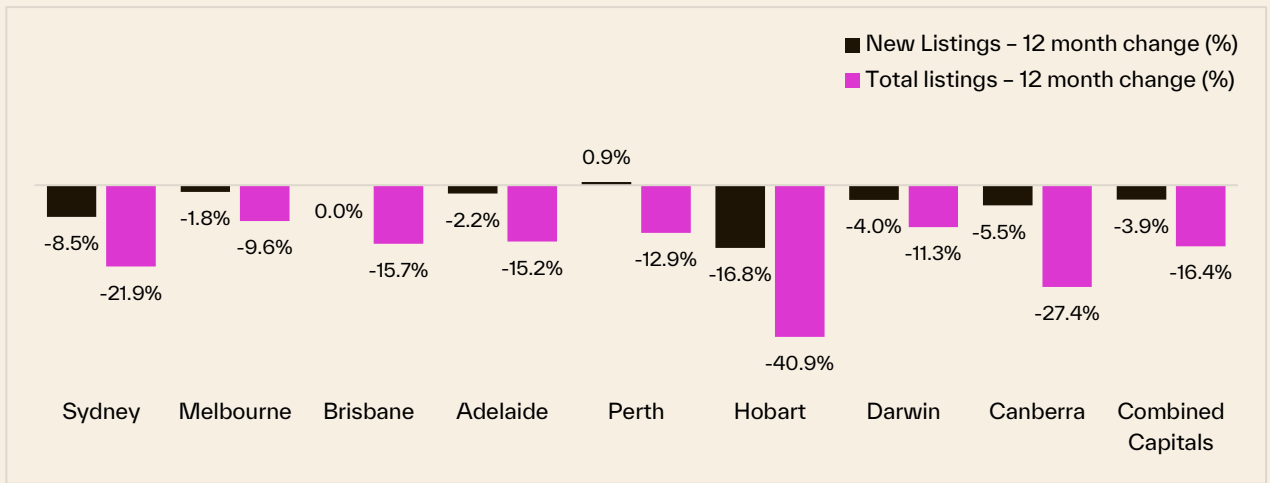
These results are calculated across properties that have been advertised for sale over the 28 days ending 14 September 2025. A new listing is one which has not been previously advertised for sale within 75 days, total listings include new listings and properties which have been previously advertised.

Property Market Indicator Summary

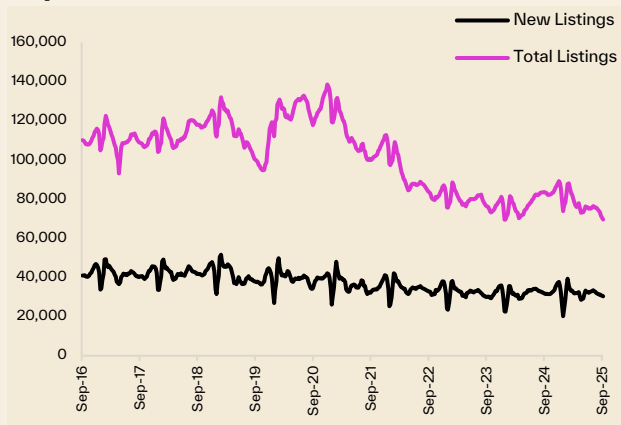
Capital city properties listed for rent – four week count



Rental listings – 12 month change (%)



Number of homes for rent, combined capital cities



Rental snapshot – data to August 2025

Region	Change in rents (all dwellings)				Gross yields (all dwellings)		Vacancy rates (all dwellings)	
	Median rent	Month	Quarter	Annual	Current	12 months ago	Current	12 months ago
Sydney	\$801	0.3%	0.7%	3.1%	3.0%	3.0%	1.7%	2.4%
Melbourne	\$615	0.2%	0.5%	1.2%	3.7%	3.6%	1.4%	1.6%
Brisbane	\$693	0.6%	1.5%	5.3%	3.6%	3.7%	1.7%	2.1%
Adelaide	\$632	0.2%	0.4%	4.2%	3.7%	3.7%	0.9%	1.2%
Perth	\$725	0.4%	0.8%	5.4%	4.2%	4.2%	1.2%	1.6%
Hobart	\$583	0.5%	0.9%	6.2%	4.4%	4.3%	1.3%	3.0%
Darwin	\$672	1.0%	3.9%	7.6%	6.5%	6.6%	1.7%	2.0%
Canberra	\$681	0.3%	0.7%	2.6%	4.1%	4.0%	1.6%	2.7%
Combined capitals	\$700	0.3%	0.8%	3.4%	3.5%	3.5%	1.5%	2.0%
Combined regionals	\$587	0.3%	1.0%	5.8%	4.4%	4.4%	1.5%	2.1%
National	\$669	0.3%	0.9%	4.1%	3.7%	3.7%	1.5%	2.0%

Property Market Indicator Summary

Top two sales over the past week, states and territories

New South Wales



7 St Elmo Street
Mosman

5 3 2

\$18,000,000

Ray White Lower North Shore



27 Carlisle Street
Tamarama

5 4 0

\$12,350,000

PPD Real Estate

Victoria



75 Bridge Street
Port Melbourne

5 3 2

\$4,510,000

Marshall White Port Phillip



6 Grange Avenue
Canterbury

3 2 2

\$4,450,000

Shelter Real Estate

Queensland



31 The Promenade
Surfers Paradise

4 4 6

\$10,500,000

Kollosche




98 Windermere Road
Hamilton

5 3 2

\$6,010,000

Ray White New Farm

South Australia

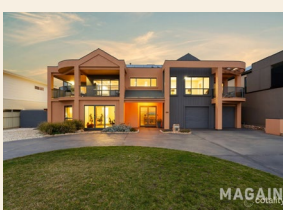


16 Louise Avenue
Fulham

4 2 0

\$2,350,000

Noakes Nickolas



239 Esplanade
Seaford

4 2 0

\$1,988,000

Magain Real Estate Happy Valley Pty Ltd

Western Australia



71 West Coast Drive
Watermans Bay

5 3 5

\$6,120,000

William Porteous Properties Int.



3 Park Beach Close
Shelley

6 3 3

\$3,200,000

Grant Premium Property Pty Ltd

Property Market Indicator Summary

Top two sales over the past week, states and territories

Tasmania



25 Mary Street
East Launceston

4 3 0

\$1,411,000

Harrison Agents Launceston



4 Fleetwood Drive
Port Sorell

4 3 8

\$1,250,000

Harcourts Devonport & Shearwater

Northern Territory



53 Tmara Mara Circuit
Araluen

4 2 2

\$959,000

Alice Springs Realty



3/10 Voyager Street
Stuart Park

3 2 2

\$790,000

Laurence Real Estate

Australian Capital Territory



5 Mulga Street
O'Connor

3 2 2

\$2,200,000

Ray White Canberra



27/9 Light Street
Griffith

3 2 0

\$1,677,000

Hive Property

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