ORCHARD
LENDING

PROPERTY MARKET SNAPSHOT

Australian residential property indicators

Week ending 30 August 2026

A clearer view of the market

A concise Orchard Lending presentation of the key auction, home-value, listing and rental indicators contained in the supplied market data report. The aim is simple: less data clutter, more useful context.

52.4% Combined capital-city preliminary auction clearance	**1,482** Capital-city auctions in the latest week	**$708** National median weekly rent

The quick take: Auction activity is picking up as spring approaches, but buyer demand remains selective. Sydney and Melbourne are still seeing much weaker auction volumes than a year ago, while Brisbane's preliminary clearance rate fell sharply last week. At the same time, rental growth remains positive across every major capital, with national rents up 5.9% over the year.

Prepared by Orchard Lending for market commentary and client discussions.

Auction market

Preliminary results for the week ending 30 August 2026

Auction volumes increased across the combined capitals, with 1,482 homes taken to auction, up 6.6% from the previous week but 32.3% below the same week last year. The combined preliminary clearance rate eased to 52.4%. Sydney remained the strongest of the major auction markets at 56.3%, while Brisbane fell to 31.5%.

Capital	Clearance	Auctions	Cleared	Uncleared
Sydney	56.3%	516	233	181
Melbourne	54.9%	653	297	244
Brisbane	31.5%	149	29	63
Adelaide	50.8%	105	33	32
Perth	n.a.	9	2	1
Tasmania	n.a.	2	2	0
Canberra	41.7%	48	15	21
Combined capitals	**52.4%**	**1,482**	**605**	**548**

Sydney	56.3% preliminary clearance, with 516 auctions. Sydney has remained above 55% for four consecutive weeks, but volumes are still 36.3% below a year ago.
Melbourne	653 auctions, the highest of the capitals, with a 54.9% preliminary clearance rate. Clearance has eased for a third week.
Brisbane	149 auctions and a 31.5% preliminary clearance rate, down sharply from 40.4% the previous week.
Adelaide	105 auctions and a 50.8% preliminary clearance rate. Auction volume was slightly above the same week last year.

Orchard summary: The increase in auction activity is worth watching as spring begins. More homes coming to market will give us a better test of how deep buyer demand really is. For now, the numbers point to a more selective auction market rather than a return to the conditions seen a year ago.

Source: Cotality Property Market Indicator Summary, data to week ending 30 August 2026. Auction results are preliminary.

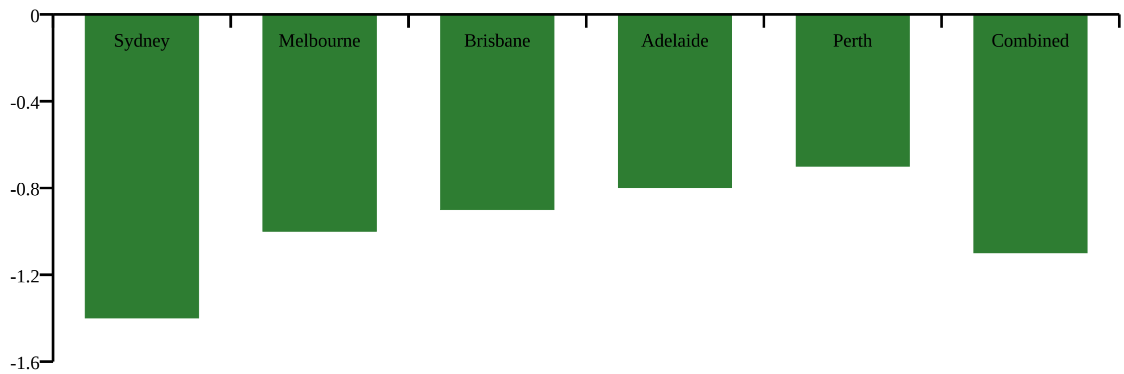
Home values

Recent momentum and year-to-date position

The latest 28-day rolling figures show softer short-term momentum across all five major capitals. Sydney recorded the largest monthly decline at 1.4%, while Brisbane, Adelaide and Perth have still retained substantial gains over the past 12 months.

Market	28-day change	Year-to-date	12-month change
Sydney	-1.4%	-6.7%	-4.6%
Melbourne	-1.0%	-6.3%	-4.7%
Brisbane	-0.9%	2.9%	11.0%
Adelaide	-0.8%	3.1%	8.7%
Perth	-0.7%	4.2%	15.7%
Combined capitals	**-1.1%**	**-2.9%**	**1.1%**

28-day rolling change in Home Value Index



What stands out: Sydney and Melbourne are now both below their January starting point, while Brisbane, Adelaide and Perth remain ahead of the start of the year. The latest month has been softer across the board, so the next few months will be useful in showing whether this is a seasonal slowdown or a more sustained change in momentum.

Source: Cotality Daily Home Value Index data contained in the supplied Property Market Indicator Summary. The 28-day figures are rolling changes, not a single month's transaction result.

Supply & rental market

Listings are rising, while rental growth remains positive

Across the combined capitals, 21,678 new sale listings and 84,961 total sale listings were recorded across the four weeks to 30 August. Compared with a year ago, new listings are down 5.6% across the capitals while total listings are up 24.4%, suggesting more properties are remaining on the market for longer.

21,678	84,961	$708
New sale listings, four weeks	Total sale listings, four weeks	National median weekly rent

Region	Median rent	Annual rent change	Gross yield	Vacancy
Sydney	$843	5.5%	3.0%	2.1%
Melbourne	$646	5.1%	3.6%	1.6%
Brisbane	$740	6.6%	3.6%	1.9%
Adelaide	$666	5.3%	3.6%	1.1%
Perth	$786	8.1%	4.2%	1.5%
Hobart	$629	8.0%	4.3%	1.6%
Darwin	$740	10.4%	6.6%	1.5%
Canberra	$706	3.3%	4.1%	1.8%
Combined capitals	$741	5.9%	3.4%	1.8%
Combined regionals	$622	5.9%	4.2%	1.9%
National	**$708**	**5.9%**	**3.7%**	**1.8%**

Rental picture: Rental growth remains one of the stronger parts of the market. Sydney's median rent is $843 per week, up 5.5% over the year. Perth and Darwin are showing even stronger annual rental growth, while vacancy rates remain relatively tight across the capitals.

Rental snapshot data is to July 2026. Sale listing counts cover the 28 days ending 30 August 2026.

Top reported sales

Highest two sales listed in the supplied weekly report

State	Property	Sale	Price
NSW	20 Wharf Road, Birchgrove	4 bed / 3 bath / 2 car	$8,300,000
NSW	33 Woolwich Road, Hunters Hill	5 bed / 2 bath / 4 car	$6,620,000
VIC	15 Castella Street, Ivanhoe East	4 bed / 5 bath / 2 car	$3,300,000
VIC	65 Fernhill Road, Sandringham	4 bed / 2 bath / 2 car	$2,900,000
QLD	38 Gretel Drive, Mermaid Waters	4 bed / 3 bath / 2 car	$5,000,000
QLD	34 Orient Drive, Sunrise Beach	6 bed / 4 bath / 2 car	$4,800,000
SA	40 Fisher Crescent, Craigburn Farm	4 bed / 2 bath / 3 car	$1,775,000
SA	72 Marian Road, Payneham	4 bed / 1 bath / 1 car	$1,800,000
WA	583 Lyon Road, Wandi	4 bed / 3 bath / 2 car	$2,175,000
WA	45 Ramsdale Street, Doubleview	3 bed / 1 bath / 1 car	$1,900,000
TAS	15 Freshwater Street, Beaumaris	3 bed / 2 bath / 2 car	$1,000,000
TAS	14 Zenith Court, Howrah	4 bed / 1 bath / 2 car	$940,000
NT	10 Barker Road, Howard Springs	4 bed / 2 bath / 8 car	$1,900,000
NT	25 Banksia Street, Nightcliff	5 bed / 3 bath / 2 car	$1,812,000
ACT	20 Mackay Crescent, Kambah	5 bed / 3 bath / 2 car	$1,825,000
ACT	**37 Cargelligo Street, Duffy**	**4 bed / 2 bath / 3 car**	**$1,350,000**

These are included as a snapshot of notable reported sales rather than as a ranking of the broader market. Individual sale prices vary substantially by location, property type and quality.

Source: supplied Cotality Property Market Indicator Summary, week ending 30 August 2026.

What this means for borrowers

Using market indicators as context, not as a substitute for individual lending advice

Auction conditions	A 52.4% preliminary combined-capital clearance rate points to a more selective auction environment, while spring volumes are starting to increase.
Short-term values	The latest 28-day figures are negative across the major capitals, but the longer-term picture still varies considerably between cities.
Supply	Total sale listings are materially higher than a year ago, while new listings are lower across the combined capitals. That can mean more choice for buyers without an overwhelming flood of fresh stock.
Rental pressure	Rents continue to rise nationally, with a 5.9% annual increase across both combined capitals and combined regional markets.

YOUR VISION. OUR GUIDANCE.

Market conditions can provide useful context, but finance decisions are personal. Orchard Lending can help compare lender options and structure finance around your needs, objectives and broader financial position.

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