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PROPERTY MARKET SNAPSHOT

Australian residential property indicators

Week ending 13 September 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.

58.5%	1,594	$711
Combined capitals preliminary auction clearance	Combined capital-city auctions	National median weekly rent

Prepared for Orchard Lending clients and market discussions

Auction market

Preliminary results for the week ending 13 September 2026

Auction activity increased last week, with 1,594 homes taken to auction across the combined capitals, up 11.4% on the previous week but 33.6% below the same week last year. The preliminary clearance rate rose to 58.5%, its strongest result in 19 weeks, although it remained below the 69.0% recorded a year earlier.

Capital	Clearance	Auctions	Cleared	Uncleared
Sydney	59.6%	557	235	159
Melbourne	63.3%	713	365	212
Brisbane	41.6%	168	52	73
Adelaide	55.6%	78	30	24
Perth	46.7%	21	7	8
Tasmania	n.a.	0	0	0
Canberra	46.9%	57	15	17
Combined capitals	**58.5%**	**1,594**	**701**	**496**

Market	Commentary
Melbourne	63.3% preliminary clearance, a 24-week high and the strongest major-capital result, with 713 homes taken to auction.
Sydney	59.6% preliminary clearance, its highest result in 19 weeks, with 557 homes taken to auction.
Brisbane	41.6% clearance, sharply higher than last week’s 24.8%, although still the lowest of the capitals.
Adelaide	55.6% preliminary clearance, up strongly from 34.5% two weeks earlier, with 78 auctions held.

Auction volumes are expected to rise as spring advances, with approximately 1,930 homes scheduled for auction this week before the number is projected to fall to around 1,510 the following week due to the AFL Grand Final long weekend in Victoria.

Source note: figures are based on the supplied Property Market Indicator Summary, data to week ending 13 September 2026. Results are preliminary.

Home values

28-day rolling and year-to-date indicators

The latest report shows softer short-term momentum across the combined capitals, with the Home Value Index down 1.1% over the latest 28 days. The longer-period picture remains mixed, with Brisbane, Adelaide and Perth still recording positive year-to-date growth and stronger 12-month gains.

Market	28-day change	Year-to-date	12-month change
Sydney	-1.5%	-7.2%	-5.4%
Melbourne	-1.3%	-6.6%	-5.5%
Brisbane	-1.3%	+2.3%	+9.4%
Adelaide	-0.9%	+2.8%	+8.0%
Perth	-0.9%	+3.8%	+14.2%
Combined capitals	**-1.1%**	**-3.4%**	**+0.2%**

28-day rolling change in Home Value Index

Sydney -1.5% | Melbourne -1.3% | Brisbane -1.3% | Adelaide -0.9% | Perth -0.9% | Combined capitals -1.1%

Interpretation for lending conversations: the indicators point to softer short-term capital-city momentum, while the longer-period picture remains materially different between cities. Property value movement should be considered alongside serviceability, borrowing capacity, lender policy and the individual property.

Supply & rental market

Listings and rental indicators

The supplied report records 22,197 new capital-city sale listings and 85,820 total sale listings across the four weeks ending 13 September 2026. New listings were 6.8% below the same period last year, while total listings were 23.7% higher. Rental data is shown to August 2026, with the national median rent at $711 per week, up 5.7% over the past year.

22,197	85,820	$711
New sale listings — four weeks	Total sale listings — four weeks	National median rent

Region	Median rent	Annual rent change	Gross yield
Sydney	$842	4.8%	3.3%
Melbourne	$648	5.0%	4.0%
Brisbane	$742	6.4%	3.4%
Adelaide	$670	5.8%	3.6%
Perth	$790	8.0%	3.9%
Hobart	$633	7.9%	4.4%
Darwin	$757	11.4%	6.3%
Canberra	$712	3.2%	4.3%
Combined capitals	$744	5.7%	3.6%
Combined regionals	$626	5.8%	4.3%
National	**$711**	**5.7%**	**3.8%**

Rental conditions remain an important consideration for property investors and borrowers assessing cash flow. The supplied figures show annual median-rent growth of 5.7% nationally, with particularly strong annual growth in Darwin, Perth and Hobart.

Top reported sales

Highest two sales listed in the supplied weekly report

State / territory	Property	Sale	Price
NSW	13 Augusta Street, Strathfield	5 bed / 3 bath / 4 car	$6,350,000
NSW	60 Womurrung Avenue, Castle Hill	5 bed / 6 bath / 5 car	$5,200,000
VIC	2/52 Black Street, Brighton	3 bed / 3 bath / 3 car	$4,455,000
VIC	38 Brewster Street, Essendon	5 bed / 3 bath / 2 car	$4,300,000
QLD	1 Sutherland Avenue, Ascot	6 bed / 5 bath / 3 car	$17,000,000
QLD	20 Rebecca Court, Broadbeach Waters	6 bed / 5 bath / 4 car	$8,450,000
SA	49A Tutt Avenue, Kingswood	5 bed / 2 bath / 4 car	$2,030,000
SA	9 Anson Avenue, Clapham	4 bed / 2 bath / 2 car	$1,900,000
WA	5 Portree Way, Ardross	5 bed / 2 bath / 3 car	$2,962,000
WA	28 Hall Street, Exmouth	4 bed / 2 bath / 4 car	$2,030,000
TAS	6 Beach Rd, Lindisfarne	6 bed / 2 bath / 3 car	$1,425,000
TAS	387 Lenah Valley Road, Lenah Valley	4 bed / 1 bath / 2 car	$1,200,000
NT	5 Norcock Place, Rapid Creek	5 bed / 2 bath / 4 car	$1,400,000
NT	2/3 D'Ambrosio Court, Parap	3 bed / 2 bath / 2 car	$975,000
ACT	3 Plunkett Street, Chifley	4 bed / 2 bath / 2 car	$1,750,000
ACT	**26 Mclachlan Crescent, Weetangera**	**4 bed / 2 bath / 1 car**	**$1,470,000**

The source report presents these as the top two sales for each state or territory over the past week. They are included as a market colour indicator rather than a valuation benchmark for individual properties.

What this means for borrowers

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

Indicator	Commentary
Auction conditions	A 58.5% preliminary combined-capital clearance rate suggests a more active but still selective auction environment, with the result at its strongest level in 19 weeks.
Short-term values	The supplied 28-day Home Value Index changes are negative across all listed capitals, indicating softer recent momentum despite positive longer-term growth in several markets.
Rental pressure	Median rents remain elevated, with annual rent growth of 5.7% nationally and across the combined capitals.
Supply	New listings remain below last year, while total listings are materially higher. This can affect buyer choice and competition, but listing counts alone do not determine property values or borrowing capacity.

YOUR VISION. OUR GUIDANCE.

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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