PROPERTY MARKET SNAPSHOT

Australian residential property indicators
Week ending 25 October 2026

A clearer view of the market

A concise Orchard Lending presentation of key auction, home-value, listing and rental indicators from Cotality's weekly Property Market Indicator Summary.

48.4%	1,882	$713
Combined-capital 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 25 October 2026

Auction activity rebounded across the combined capitals, with 1,882 homes taken to auction, up 33.1% on the previous week. Volumes were still 41.8% below the same week last year. The preliminary clearance rate fell to 48.4%, down from 51.2% the week before, and has remained below 50% in three of the past four weeks.

Capital	Clearance	Auctions	Reported results	Cleared	Uncleared
Sydney	48.2%	631	440	212	228
Melbourne	54.8%	831	663	363	300
Brisbane	25.2%	200	123	31	92
Adelaide	42.5%	141	73	31	42
Perth	50.0%	19	14	7	7
Tasmania	n.a.	0	0	0	0
Canberra	52.1%	60	48	25	23
Combined capitals	**48.4%**	**1,882**	**1,361**	**658**	**703**

Notable results

Market	Commentary
Melbourne	Auction numbers rose to 831, up 68% on the previous week, but remained 54.7% below the same week last year. The 54.8% preliminary clearance rate was 1.4 percentage points lower and slightly below the spring-to-date average of 55.4%.
Sydney	The preliminary clearance rate fell below 50% for the first time in 12 weeks, to 48.2%. Its 631 auctions were 10.7% higher than the previous week but 34.1% below a year earlier.
Brisbane	The lowest capital-city preliminary clearance rate was 25.2%, the city's fourth-lowest result so far this year. Auction volumes rose 25.0% week on week and were 6.4% higher than a year earlier.
Adelaide & Canberra	Adelaide recorded a 42.5% clearance rate across 141 auctions. Canberra's clearance rate fell 13.8 percentage points to 52.1%, with 60 auctions held.

Cotality expects approximately 1,900 auctions across the capitals next week, before volumes ease to around 1,500 at the beginning of November. Melbourne’s auction volume was the largest weekly mover, while Tasmania recorded no auctions this week.

Source note: Cotality Property Market Indicator Summary, data to week ending 25 October 2026. Auction results are preliminary.

Home values

28-day rolling and year-to-date indicators

The combined-capital Home Value Index fell 1.3% over the latest 28 days. Short-term declines were recorded across all five capital markets shown, while year-to-date and 12-month results remain mixed: Brisbane, Adelaide and Perth are still above their year-to-date starting points and show positive annual growth.

Market	28-day change	Year-to-date	12-month change
Sydney	-1.5%	-9.3%	-8.9%
Melbourne	-0.7%	-7.7%	-7.4%
Brisbane	-1.6%	-1.3%	+2.8%
Adelaide	-0.9%	+1.0%	+4.6%
Perth	-1.6%	+0.1%	+6.2%
Combined capitals	**-1.3%**	**-5.7%**	**-3.9%**

28-day rolling change in Home Value Index

Sydney -1.5% | Melbourne -0.7% | Brisbane -1.6% | Adelaide -0.9% | Perth -1.6% | Combined capitals -1.3%

Interpretation for lending conversations: the latest figures point to softer short-term capital-city momentum. Longer-period outcomes vary by city, with Sydney and Melbourne recording annual falls while Brisbane, Adelaide and Perth remain in positive 12-month territory. Property values should be considered alongside serviceability, borrowing capacity, lender policy and the individual property.

Source: Cotality Property Market Indicator Summary, week ending 25 October 2026. Home Value Index figures are based on the Cotality Daily Home Value Index.

Supply & rental market

Listings and rental indicators

In the 28 days to 25 October, the combined capitals recorded 24,223 new sale listings and 91,052 total sale listings. Cotality's year-on-year chart shows new listings down 16.9%, while total listings were 20.7% higher. The rental snapshot is for September 2026, with the national median rent at $713 per week, up 5.5% over the year.

24,223	91,052	$713
New sale listings 28 days to 25 October	Total sale listings 28 days to 25 October	National median rent September 2026

Rental snapshot

Region	Median rent	Annual rent change	Gross yield	Vacancy rate
Sydney	$843	4.4%	3.4%	1.8%
Melbourne	$648	4.9%	3.6%	1.5%
Brisbane	$746	6.4%	3.5%	1.8%
Adelaide	$672	6.3%	3.6%	1.0%
Perth	$798	8.0%	4.0%	1.2%
Hobart	$637	8.0%	4.4%	1.3%
Darwin	$774	11.6%	6.5%	2.1%
Canberra	$708	3.1%	4.4%	1.5%
Combined capitals	$746	5.5%	3.7%	1.6%
Combined regionals	$628	5.6%	4.3%	1.6%
National	**$713**	**5.5%**	**3.9%**	**1.6%**

Rental conditions remain important when assessing investment cash flow. National median rent rose 5.5% over the year, while rental growth was strongest in Darwin at 11.6%. These figures provide broad context only; property-level rent, costs and vacancy conditions can differ substantially.

Source: Cotality Property Market Indicator Summary, week ending 25 October 2026. Rental snapshot data to September 2026.

Top reported sales

Highest sales listed in the weekly Cotality report

The report lists notable sales by state and territory. These are included as market colour only and are not valuation benchmarks for individual properties.

State / territory	Property	Sale details	Price
NSW	3/18 Greycliffe Street, Queenscliff	4 bed / 3 bath / 1 car	$10,100,000
NSW	10/1-2 Tower Street, Manly	4 bed / 3 bath / 2 car	$6,700,000
VIC	15 Freemans Road, Mount Eliza	6 bed / 4 bath / 2 car	$12,000,000
VIC	52 William Street, Essendon	5 bed / 5 bath / 3 car	$5,550,000
QLD	13/1 Enderley Avenue, Surfers Paradise	5 bed / 3 bath / 3 car	$6,450,000
QLD	12/5-9 Broadbeach Boulevard, Broadbeach	4 bed / 2 bath / 2 car	$5,700,000
SA	59 Windsor Avenue, Woodville Park	4 bed / 2 bath / 4 car	$2,150,000
SA	7 Tarlton Street, Somerton Park	5 bed / 2 bath / 2 car	$2,070,000
WA	130 Watsonia Road, Gooseberry Hill	6 bed / 3 bath / 10 car	$2,500,000
WA	7 Positano Way, Hillarys	4 bed / 2 bath / 2 car	$2,275,000
TAS	11 Hope Street, New Town	4 bed / 1 bath / 3 car	$1,350,000
TAS	120 Kathleen Drive, Old Beach	3 bed / 2 bath / 20 car	$1,175,000
NT	23 Claymore Circuit, Brinkin	4 bed / 2 bath / 2 car	$1,512,000
NT	68 Rocklands Drive, Tiwi	4 bed / 2 bath / 2 car	$750,000
ACT	59 Newdegate Street, Deakin	4 bed / 2 bath / 2 car	$1,956,000
ACT	15 Aviemore Lane, Red Hill	3 bed / 2 bath / 2 car	$1,735,000

Source note: property details and sale prices reproduced from Cotality's Property Market Indicator Summary, week ending 25 October 2026.

What this means for borrowers

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

Indicator	Commentary
Auction conditions	The preliminary combined-capital clearance rate fell to 48.4% as auction volumes rose to 1,882. Activity remained 41.8% below the same week last year, so the weekly lift in volumes did not signal a return to last year's level.
Short-term values	The 28-day Home Value Index fell 1.3% across the combined capitals, with declines across all five capital markets shown. Year-to-date and annual results differ materially by city.
Rental pressure	National median rent was $713 per week in September, up 5.5% annually. Investors should assess realistic property-level rent against purchase price, costs and finance.
Supply	New sale listings were down 16.9% year on year, while total listings were up 20.7%. This points to fewer fresh listings but a larger overall pool of advertised stock.

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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