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DAVIDSON COUNTY
ULTRA-LUXURY MARKET REPORT
FEBRUARY 2026

EXECUTIVE SUMMARY

February marked a clear rebound in Davidson County's ultra-luxury market following the weather disruption that slowed activity late in January.

Delayed listings entered the market as conditions stabilized, while buyer demand quickly returned to Nashville's top-tier neighborhoods.

The result was a noticeable increase in new inventory and stronger pricing across the segment. The average closed sale price climbed above \$4.1M, reinforcing continued demand for well-positioned luxury properties.

While activity improved, the market remained disciplined rather than speculative. Buyers continued to prioritize quality homes in prime locations.

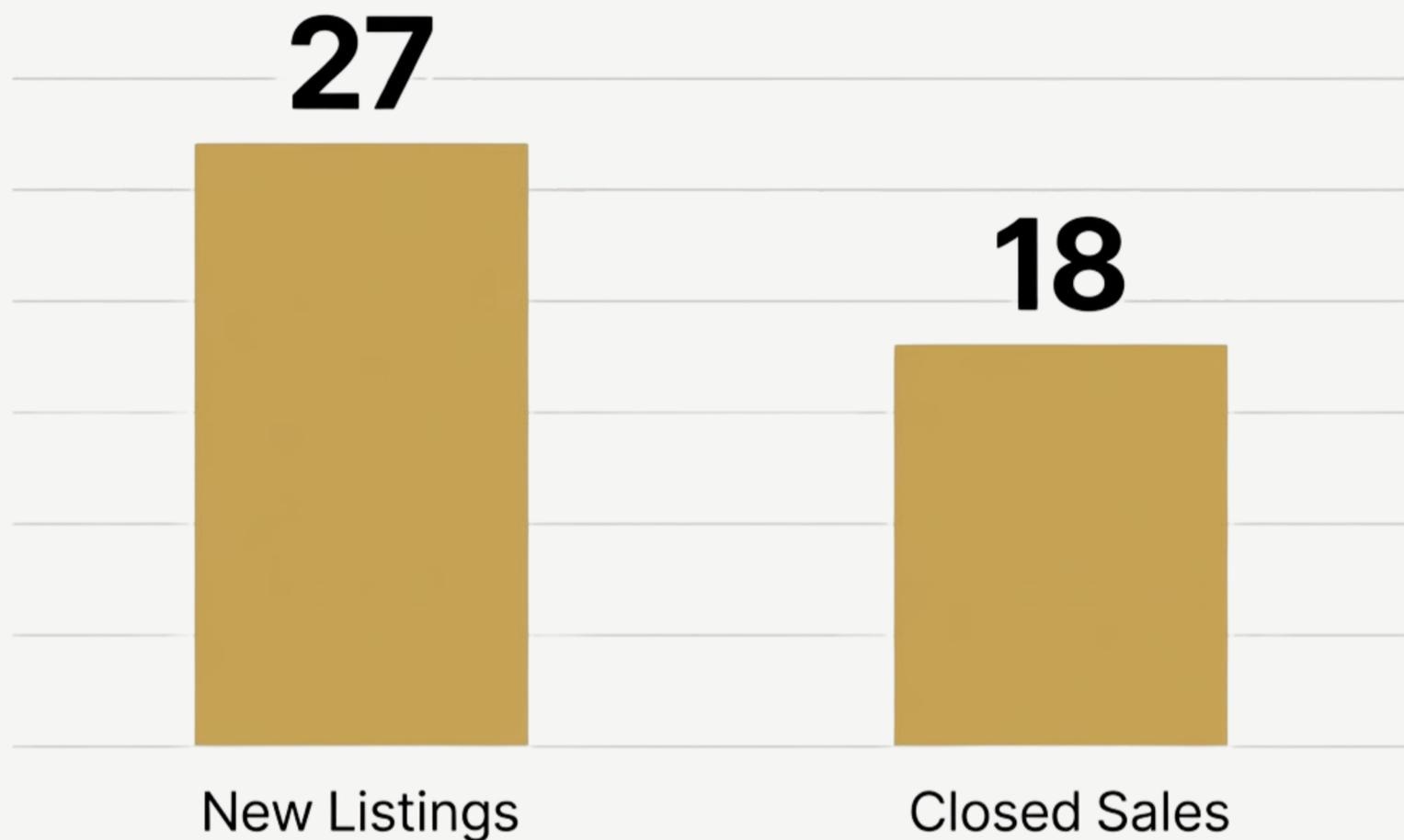
The \$4M-\$7M price range remains the transactional core of Nashville's ultra-luxury market.



KEY METRICS

February 2026 Ultra-Luxury Market Snapshot

NEW LISTINGS	CLOSED SALES	AVG CLOSED PRICE	AVG \$/SQFT
27	18	\$4.19M	\$636
TRANSACTIONAL CORE			
\$4M – \$7M			



MARKET ACTIVITY

February 2026 Ultra-Luxury Segment

February brought a meaningful increase in new listings as delayed inventory entered the market following January's weather disruptions.

While supply expanded, buyer demand remained active, resulting in 18 closed transactions across Davidson County's ultra-luxury segment.

The balance between new inventory and completed sales suggests a healthy but disciplined market where well-priced homes continue to transact efficiently.

\$4.19M

Average Closed Price

Davidson County Ultra-Luxury Market

\$636

Average \$ / Sq Ft

February 2026

PRICING TRENDS

February 2026 Ultra-Luxury Segment

February's ultra-luxury market demonstrated continued pricing strength across Davidson County.

The average closed sale price reached \$4.19M, reflecting strong buyer demand for well-positioned luxury homes.

Meanwhile, the average price per square foot held at \$636, reinforcing the value buyers continue to place on prime location, architecture, and quality construction.

While inventory increased slightly, pricing remained stable, suggesting a balanced market where strategic pricing and presentation remain critical to achieving top results.

21 Days

Average Days on Market

Davidson County
Ultra-Luxury Market

98%

Sale-to-List Ratio

February 2026

MARKET VELOCITY

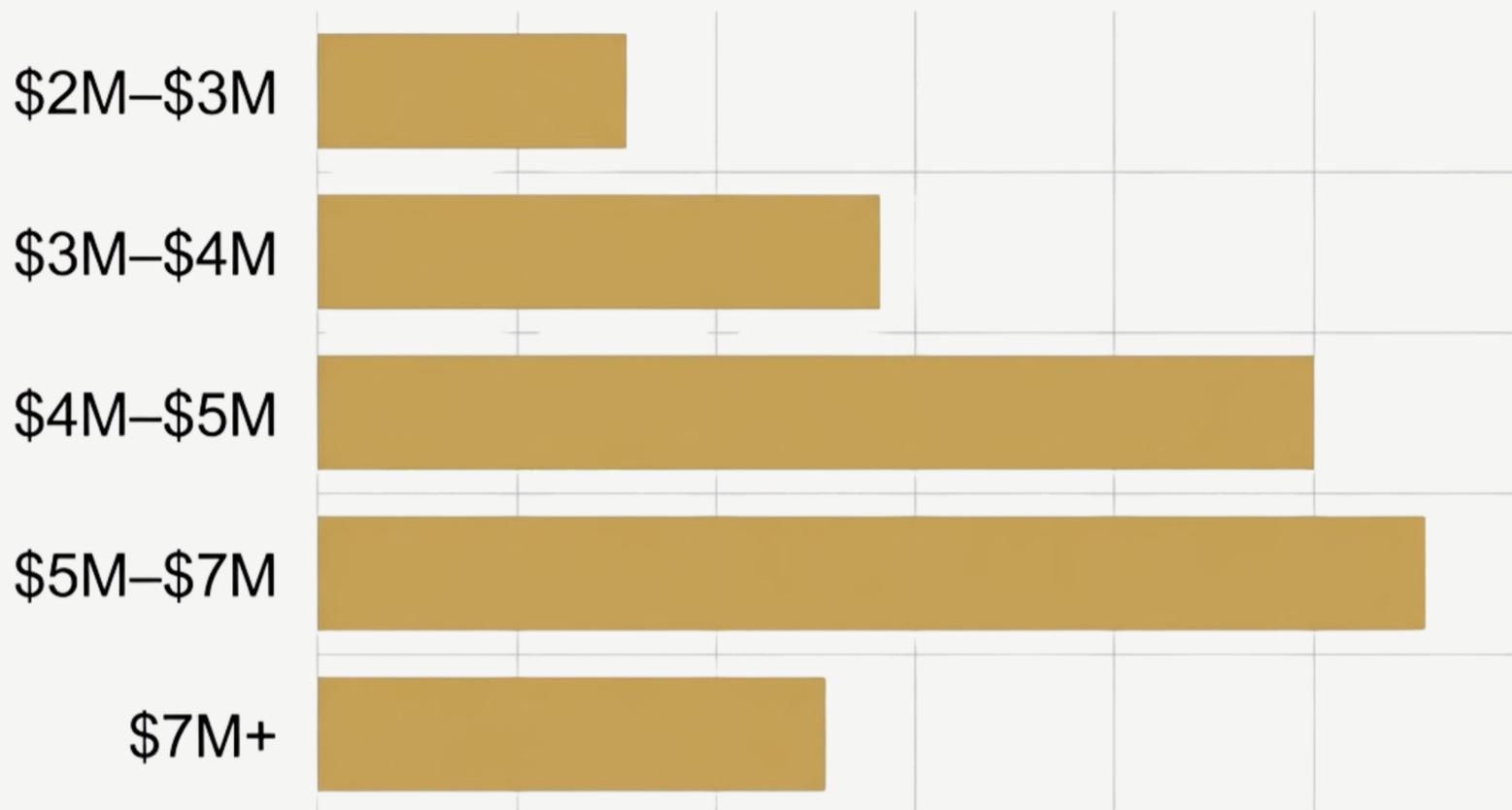
February 2026 Ultra-Luxury Segment

February transactions reflected continued buyer confidence in Davidson County's ultra-luxury market.

Well-positioned homes moved efficiently, with an average time on market of roughly three weeks. Sale-to-list ratios remained strong, with most homes closing near their asking price when properly priced and presented.

This level of velocity reinforces that demand remains healthy for prime properties despite the gradual increase in inventory.

TRANSACTION BREAKDOWN – FEBRUARY 2026



PRICE DISTRIBUTION

February 2026 Ultra-Luxury Segment

February's ultra-luxury transactions continued to concentrate within Nashville's \$4M–\$7M range, reinforcing this segment as the transactional core of the market.

While activity extended across multiple price tiers, the majority of completed sales occurred within this mid-luxury bracket, where buyers continue to find the strongest balance of location, architecture, and long-term value.

Higher price points above \$7M remain more selective but continue to transact when properties offer exceptional design, privacy, and positioning within Nashville's most desirable neighborhoods.

This distribution reflects a market where demand remains strong but buyers remain disciplined, prioritizing quality and long-term value.

Inventory
Increasing

Demand
Strong

Pricing
Stable

MARKET POSITIONING

February 2026 Ultra-Luxury Segment

February's market data suggests a balanced but active environment across Nashville's ultra-luxury segment.

Inventory increased as delayed listings entered the market following January's weather disruptions. Despite the additional supply, buyer demand remained steady, allowing well-positioned homes to transact efficiently.

With an average time on market of roughly three weeks and sale-to-list ratios near the asking price, the data indicates a disciplined market where properly priced properties continue to perform well.

Rather than signaling a shift in demand, the recent increase in inventory reflects a normalization of listing activity while buyer confidence remains strong.

WHAT THIS MEANS FOR BUYERS & SELLERS – FEBRUARY 2026

For Buyers

More Inventory

More choices entering the ultra-luxury market as new listings increase.

For Sellers

Strong Demand

Well-positioned homes continue to sell quickly with pricing discipline.

WHAT THIS MEANS FOR BUYERS & SELLERS

February 2026 Ultra-Luxury Segment

February's market conditions continue to favor well-prepared buyers and strategic sellers across Nashville's ultra-luxury segment.

For buyers, the increase in new listings provides additional opportunities to evaluate properties across several luxury price tiers. While selection has improved, strong demand means well-positioned homes continue to attract attention quickly.

For sellers, the data reinforces the importance of strategic pricing and presentation. Properties that are well-positioned within the market continue to sell efficiently, often close to their asking price.

Overall, the market remains balanced, with healthy demand supporting stable pricing across Nashville's most desirable luxury neighborhoods.

ACTIVE HIGHLIGHT

4410 Truxton Pl — Belle Meade
List Price: \$23,800,000

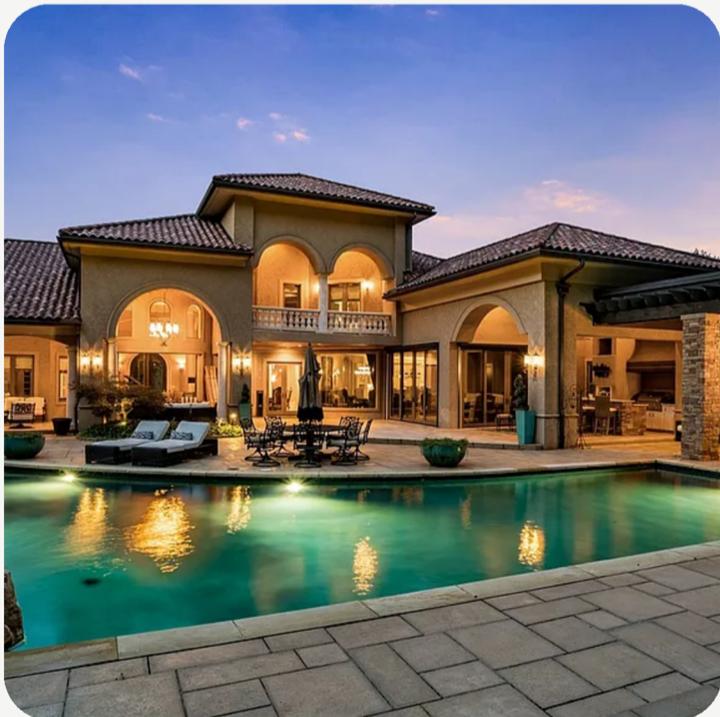
- Highest-priced active listing in Davidson County
- 10,399 sq ft estate
- 5 bedrooms, 6 full baths, 3 half baths
- Rare Belle Meade legacy-scale property

This listing reinforces Nashville's growing presence at the \$20M+ tier of luxury inventory.

4410 Truxton Pl Belle Meade | \$23.8M



947 Tyne Blvd | Bridle Path Estates | \$7 M



CLOSED HIGHLIGHT

947 Tyne Blvd — Bridle Path Estates
Sold Price: \$7,000,000 (Feb 26, 2026)

- Highest-priced closed sale recorded in February
- 10,391 sq ft estate
- 5 bedrooms, 5 full baths
- Prime Tyne Blvd / Oak Hill–Forest Hills corridor positioning

February's executable luxury ceiling advanced to \$7M, confirming strong demand for blue-chip estate properties.

MARKET OUTLOOK – FEBRUARY 2026

Spring Market
Accelerating

Price Floor
Rising

Luxury Demand
Disciplined

MARKET OUTLOOK

February 2026 Ultra-Luxury Segment

The first two months of 2026 highlight the continued resilience of Davidson County's ultra-luxury housing market.

Following January's temporary slowdown caused by severe winter weather, February activity demonstrated a clear rebound as delayed inventory entered the market and buyers returned with renewed confidence.

Looking ahead to the spring season, several key dynamics are expected to shape the market.

New listings entering the \$4M–\$7M range are likely to increase as sellers respond to strong pricing signals and improved market conditions. This segment continues to represent the most active portion of the ultra-luxury market.

At the same time, properties positioned above the \$7M threshold remain selective but continue to transact when they offer exceptional design, location, and long-term value.

Overall, the data suggests that Nashville's ultra-luxury market remains healthy and balanced, supported by disciplined buyers and a growing national reputation as a destination for high-net-worth relocation and investment.

WHY LIST WITH Alexander Brandau IV

Nashville's ultra-luxury market has become more selective, and representation matters more than ever. Alexander's disciplined pricing strategy, understanding of buyer behavior, and experience advising top-tier transactions help properties stand out when precision and execution define outcomes.



Whether advising in the Gulch, Midtown, or West End, Alexander and his team take a disciplined, data-informed approach to positioning each property with clarity and precision.

Private Ultra-Luxury Strategy Consultation

Scan the QR code to request a confidential review of your property's valuation, positioning, and negotiation strategy in the current market cycle.

