

Prepared by Alexander Brandau IV
Aperture Global Real Estate



DAVIDSON COUNTY
ULTRA-LUXURY MARKET REPORT
MARCH 2026

EXECUTIVE SUMMARY

March marked a decisive acceleration in Davidson County's ultra-luxury market, building on February's rebound and confirming the start of the spring surge.

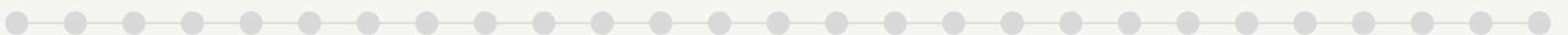
A significant increase in new inventory entered the market as seller confidence returned, with 50 new listings representing a sharp rise from the previous month.

Buyer demand remained strong and responsive. Closed sales climbed to 27 transactions, demonstrating the market's ability to absorb the influx of new inventory efficiently.

Pricing experienced a notable upward shift. The average closed sale price rose to approximately \$4.41M, while the average price per square foot surged to \$1,438—driven by ultra-premium transactions at the top end of the market.

Despite this rapid growth, the market remains disciplined rather than speculative. Buyers continue to prioritize quality, location, and turnkey properties.

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



KEY METRICS

March 2026 Ultra-Luxury Market Snapshot

NEW LISTINGS	CLOSED SALES	AVG CLOSED PRICE	AVG \$/SQFT
50	27	\$4.41M	\$1,438
TRANSACTIONAL CORE			
\$4M – \$7M			

MARKET PULSE – MARCH 2026



MARKET ACTIVITY

March 2026 Ultra-Luxury Segment

March activity reflected a sharp acceleration in both inventory and buyer engagement across Davidson County's ultra-luxury market.

New listings surged to 50 properties, marking a significant increase from February as sellers re-entered the market with confidence ahead of the spring season.

Buyer demand remained strong and responsive, resulting in 27 closed transactions and confirming the market's ability to absorb rising inventory levels.

This balance between expanding supply and sustained demand signals a healthy and active market, where well-positioned homes continue to transact efficiently.

PRICING ANALYSIS – MARCH 2026

\$4.41M

Average Closed Price

\$1,438

Average \$ / Sq Ft

PRICING TRENDS

MARCH 2026 Ultra-Luxury Segment

March pricing metrics reflected a significant upward shift in Davidson County's ultra-luxury market.

The average closed sale price rose to approximately \$4.41M, reinforcing continued demand for high-quality, well-positioned homes.

More notably, the average price per square foot surged to \$1,438, driven by record-breaking transactions at the top end of the market.

This sharp increase highlights the growing willingness of high-net-worth buyers to pay a premium for exceptional properties in prime locations.

Despite the rapid rise in pricing, the market remains disciplined, with buyers continuing to prioritize long-term value, design, and overall livability.

MARKET VELOCITY – MARCH 2026

21 Days

Average Days on Market

98%

Sale-to-List Price Ratio

MARKET VELOCITY

March Ultra-Luxury Segment

March market velocity reflects continued strength in buyer activity across Davidson County's ultra-luxury segment.

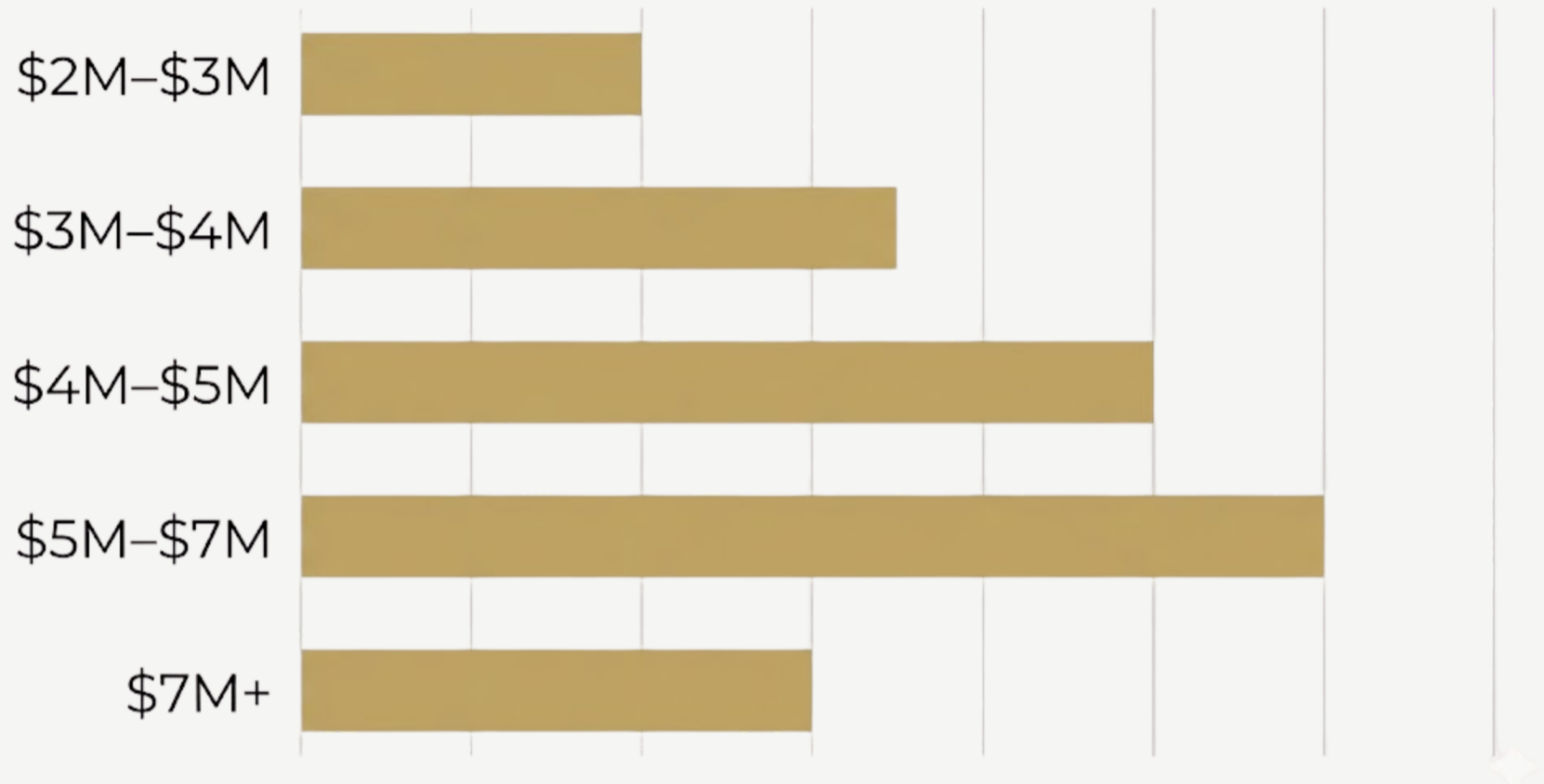
Well-positioned homes moved efficiently, with an average time on market of approximately three weeks.

Sale-to-list price ratios remained strong at 98%, indicating that most properties are transacting close to their asking price when properly priced and presented.

This level of efficiency highlights sustained buyer confidence and reinforces the importance of strategic pricing and market positioning.

Despite increased inventory levels, demand continues to support steady absorption for high-quality properties in prime locations.

TRANSACTION BREAKDOWN – MARCH 2026



PRICE DISTRIBUTION

March 2026 Ultra-Luxury Segment

March transaction activity concentrated heavily within the \$4M–\$7M range, reinforcing this segment as the core of Davidson County’s ultra-luxury market.

The \$5M–\$7M bracket led in total activity, followed closely by the \$4M–\$5M range, indicating strong buyer engagement in mid-to-upper luxury tiers.

While activity extended across multiple price points, lower tiers saw comparatively fewer transactions, highlighting a continued shift toward higher-value acquisitions.

Properties above \$7M remained more selective but continued to transact when offering exceptional design, location, and overall positioning.

This distribution reflects a market where demand remains strong, but buyers are increasingly discerning—prioritizing quality and long-term value over volume.

MARKET POSITIONING – MARCH 2026

Inventory
Increasing

Demand
Strong

Pricing
Stable

MARKET POSITIONING

March 2026 Ultra-Luxury Segment

March data reflect a balanced but highly active market across Davidson County's ultra-luxury segment.

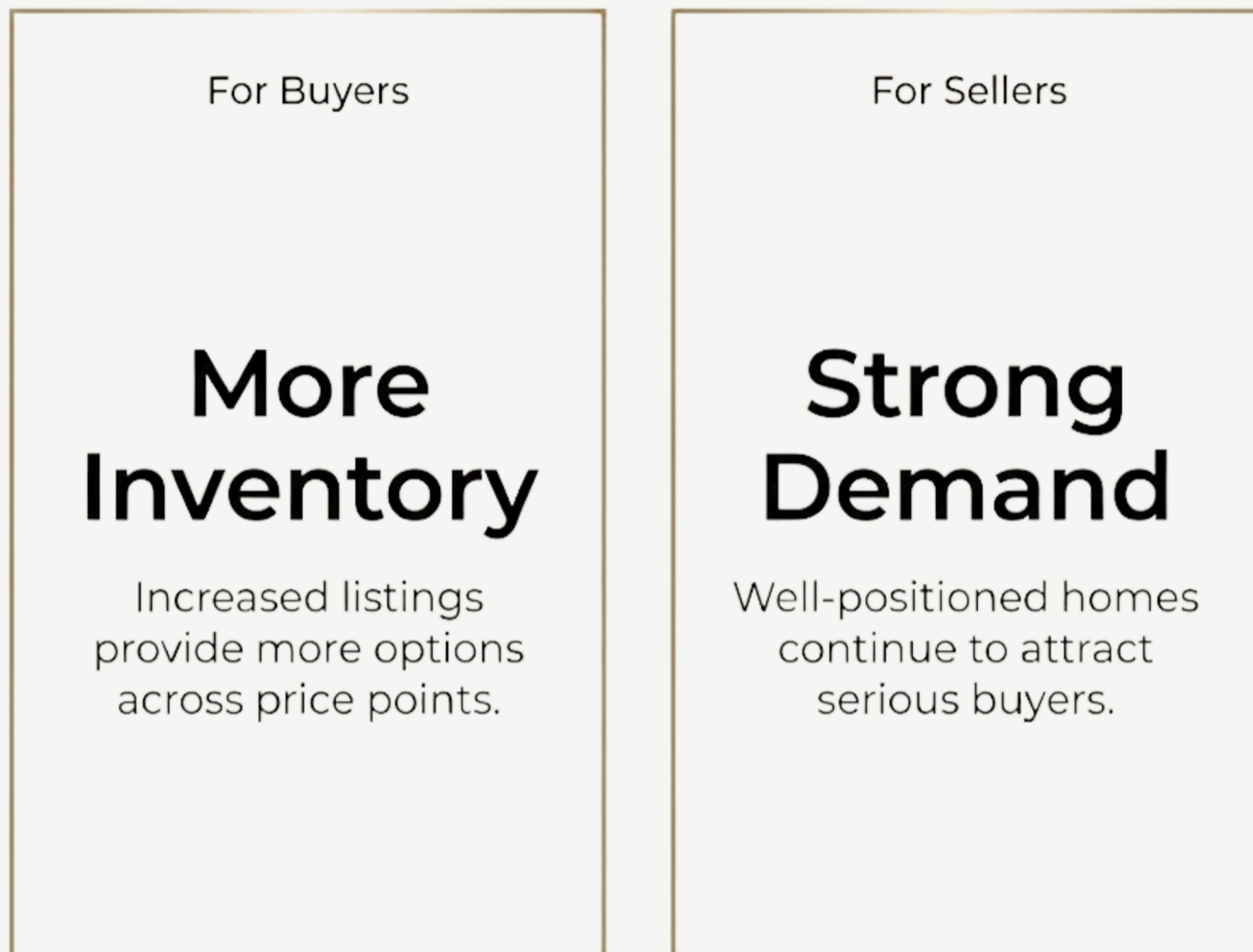
Inventory levels increased significantly as new listings entered the market, providing buyers with more options than earlier in the year.

Despite this rise in supply, demand remained strong—particularly for well-positioned, move-in-ready properties in prime locations.

Pricing continues to stabilize at elevated levels, supported by sustained buyer interest and record-setting transactions at the top end of the market.

Rather than signaling a slowdown, this shift reflects a more normalized and competitive environment where strategic pricing and presentation are critical to success.

WHAT THIS MEANS FOR BUYERS & SELLERS – MARCH 2026



WHAT THIS MEANS FOR BUYERS & SELLERS

March 2026 Ultra-Luxury Segment

March market conditions continue to favor both well-prepared buyers and strategic sellers across Davidson County's ultra-luxury segment.

For buyers, the increase in new listings creates more opportunities to evaluate properties across multiple price tiers, offering greater flexibility and choice.

At the same time, strong demand ensures that well-positioned homes continue to attract attention and transact efficiently.

For sellers, this reinforces the importance of strategic pricing and presentation. Properties that align with market expectations are continuing to perform at a high level.

Overall, the market remains balanced—offering opportunity on both sides while rewarding quality, preparation, and precision.

ACTIVE HIGHLIGHT

834 Tyne Valley Ct | \$8,200,000

834 Tyne Valley Ct — Treemont
List Price: \$8,200,000

- A premier estate was introduced during March's inventory surge
- 15,129 sq ft estate
- 6 bedrooms, 6 full baths, 4 half baths
- Premier Treemont enclave with expansive private setting



This listing reflects the scale and confidence of inventory entering the spring market.

407 Westview Ave | \$11.5M



CLOSED HIGHLIGHT

407 Westview Ave — Royal Oaks
Sold Price: \$11,500,000 (Mar 27, 2026)

- One of the highest non-anomalous luxury sales in March
- 10,347 sq ft newly built estate
- 5 bedrooms, 5 full baths, 3 half baths
- Premier Royal Oaks location with strong buyer demand

This sale reinforces continued strength at the upper end of the market while reflecting disciplined buyer behavior.

MARKET OUTLOOK – MARCH 2026

Inventory
Expanding

Price Floor
Rising

Luxury
Demand
Selective

MARKET OUTLOOK

March 2026 Ultra-Luxury Segment

The first quarter of 2026 confirms a clear shift in Davidson County's ultra-luxury market—from early-year disruption to strong acceleration.

After January's slowdown and February's recovery, March marked a breakout. Inventory surged, buyer activity strengthened, and pricing reached new highs—driven by increased supply and record-setting transactions.

Looking ahead to Q2, several key trends will shape the market:

- **Inventory Expansion:** More listings will continue to increase buyer options.
- **Core Market Stabilization:** The \$3M–\$6M segment is expected to normalize as supply and demand balance.
- **Flight to Quality:** Buyers remain selective, prioritizing turnkey homes, prime locations, and long-term value.

Overall, the market isn't slowing—it's evolving. More inventory creates opportunity, while disciplined demand rewards well-positioned properties.

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.

