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DAVIDSON COUNTY
ULTRA-LUXURY MARKET REPORT
APRIL 2026

EXECUTIVE SUMMARY

April confirmed that Davidson County's ultra-luxury market remained highly active as inventory expansion continued entering Q2.

A total of 47 new ultra-luxury listings entered the market while buyer demand remained disciplined and responsive with 25 completed transactions across Nashville's premier luxury corridors.

Pricing normalized following March's record-setting volatility, with the average closed price stabilizing at approximately \$3.58M and average pricing settling into a healthier long-term rhythm.

Turn-key estates, architectural quality, and privacy-driven properties continue commanding the market's strongest premiums as affluent buyers prioritize immediate lifestyle positioning over renovation opportunities.

The \$3M-\$6M segment remains the transactional core of Nashville's ultra-luxury market, demonstrating the strongest liquidity and most consistent buyer activity.

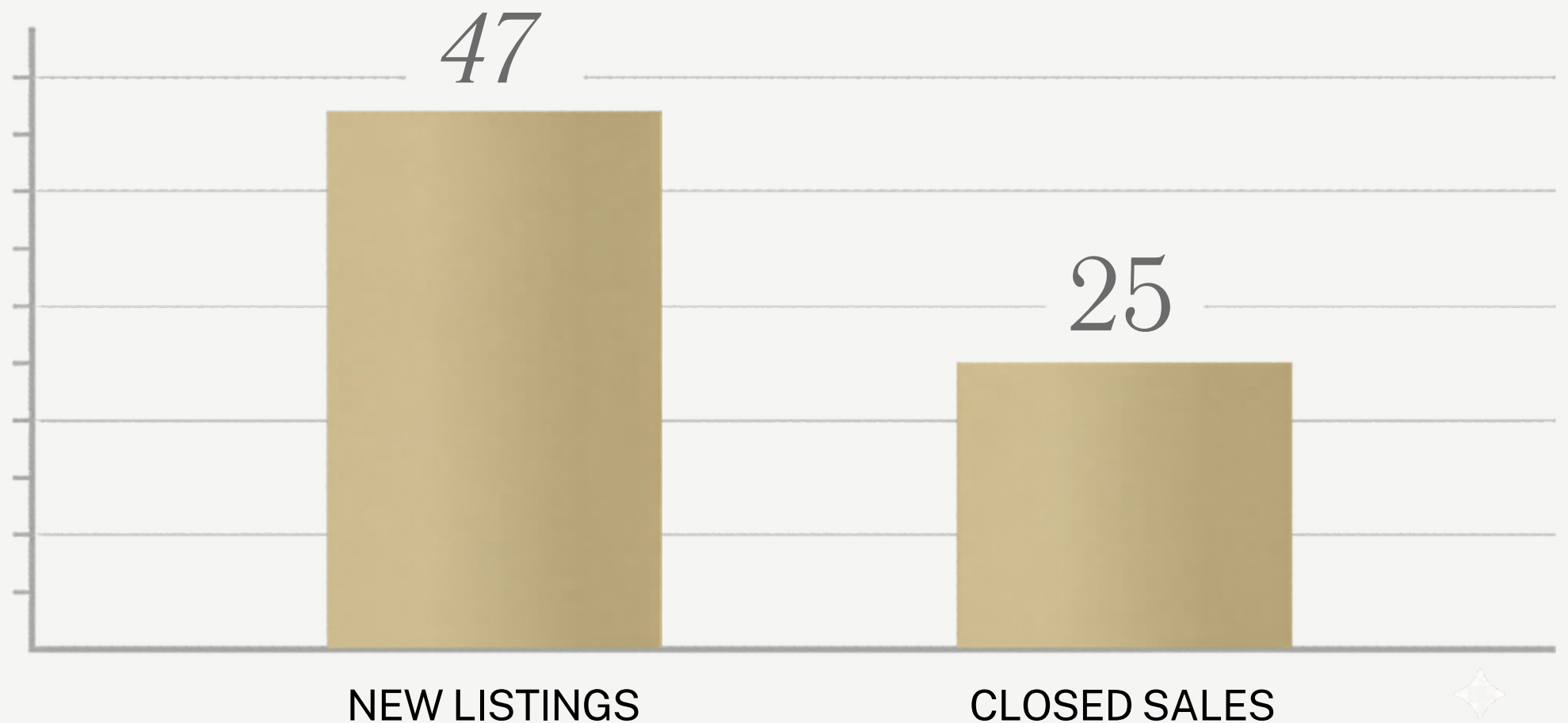


KEY METRICS

APRIL 2026 ULTRA-LUXURY MARKET SNAPSHOT

NEW LISTINGS	CLOSED SALES	AVG CLOSED PRICE	AVG \$/SQFT
47	25	\$3.58M	\$678
TRANSACTIONAL CORE			
\$3M-\$6M			

MARKET PULSE – APRIL 2026



MARKET ACTIVITY

April 2026 Ultra-Luxury Segment

April activity confirmed that Davidson County's ultra-luxury market successfully carried momentum into Q2 rather than cooling after March's record-setting surge.

Inventory expansion remained elevated with 47 new ultra-luxury listings entering the market, reinforcing growing seller confidence across Nashville's premier luxury corridors.

Buyer demand remained disciplined and highly responsive as 25 transactions successfully closed throughout April, demonstrating continued absorption of premium inventory despite increased supply.

The balance between expanding inventory and stable buyer engagement signals a healthier long-term luxury market environment heading deeper into the spring season.

PRICING ANALYSIS – APRIL 2026

\$3.58M

Average Closed Price

\$678

Average \$ / Sq Ft

PRICING TRENDS

April 2026 Ultra-Luxury Segment

April pricing metrics reflected a healthy normalization phase across Davidson County's ultra-luxury market following March's record-setting transaction activity.

The average closed sale price stabilized near \$3.58M, reinforcing continued demand for well-positioned luxury inventory across Nashville's premier residential corridors.

Average pricing per square foot settled around \$678, signaling a return to a more sustainable and disciplined pricing environment after March's anomaly-driven spike created by ultra-premium transactions.

Affluent buyers continue demonstrating strong willingness to pay premiums for architectural quality, privacy, turnkey execution, and established legacy-neighborhood positioning.

The strongest transactional liquidity continues concentrating within the \$3M–\$6M range, where properly presented estates are absorbing efficiently despite elevated inventory expansion entering Q2.

MARKET VELOCITY – APRIL 2026

24 Days

Average Days on Market

97%

Sale-to-List Price Ratio

MARKET VELOCITY

April Ultra-Luxury Segment

April market velocity reflected continued stability across Davidson County's ultra-luxury segment as buyer demand remained disciplined despite expanding inventory entering Q2.

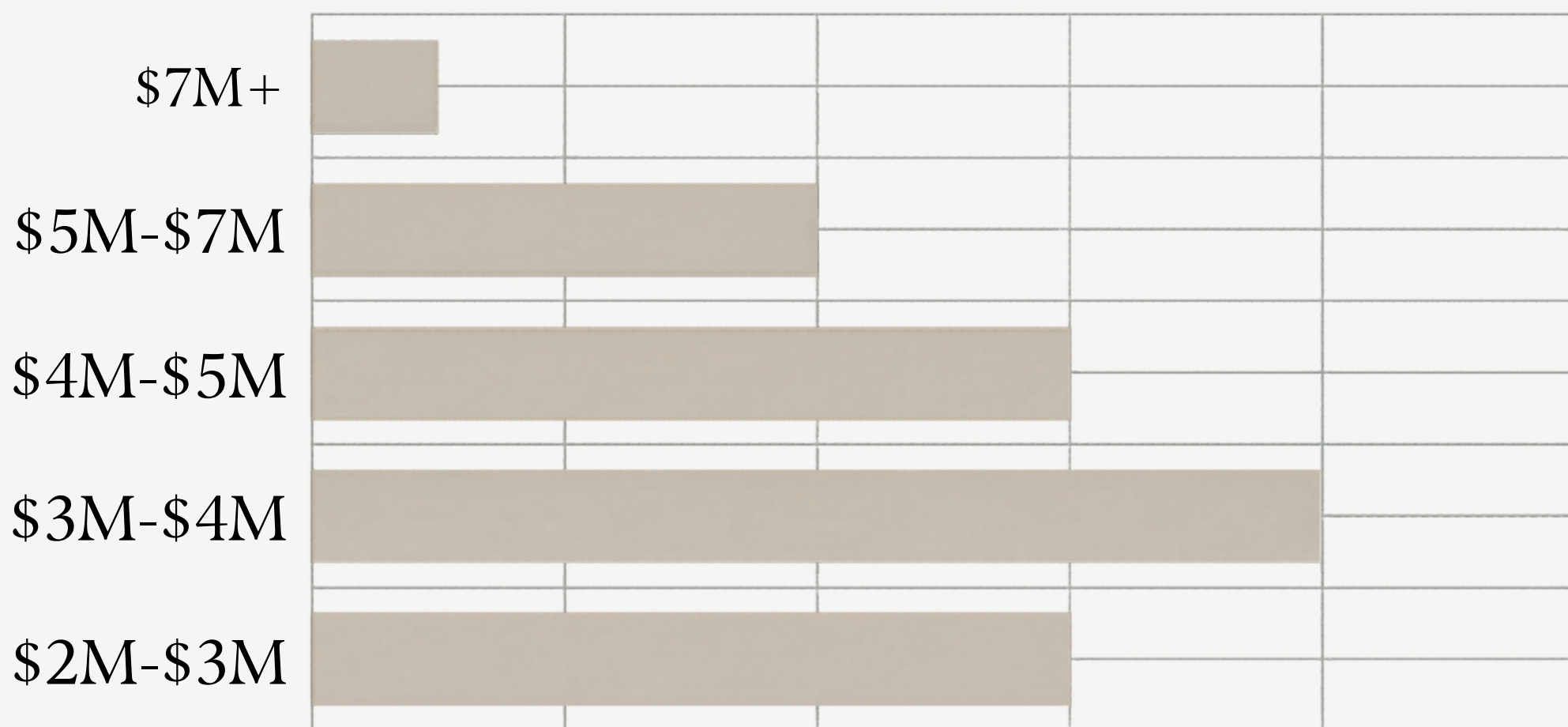
Well-positioned properties continued transacting efficiently with average market exposure holding near 24 days, reinforcing sustained engagement among affluent buyers targeting premier luxury inventory.

Sale-to-list pricing remained healthy near 97%, signaling that properly presented estates continue attracting serious buyer activity while maintaining pricing discipline across Nashville's established luxury corridors.

Turn-key execution, architectural quality, and long-term location desirability continue driving the market's strongest absorption rates as buyers increasingly prioritize lifestyle certainty over renovation risk.

The current velocity environment reflects a healthier and more sustainable luxury market rhythm compared to the volatility experienced earlier in Q1.

TRANSACTION BREAKDOWN – APRIL 2026



PRICE DISTRIBUTION

April 2026 Ultra-Luxury Segment

April transaction activity remained concentrated within the \$3M–\$5M range, reinforcing continued liquidity across Davidson County’s ultra-luxury market.

The \$3M–\$4M segment led overall activity, followed closely by the \$2M–\$3M and \$4M–\$5M brackets, signaling sustained buyer engagement entering Q2.

The strongest consistency continues appearing within turnkey estates offering architectural quality, privacy, and established neighborhood positioning.

The \$5M–\$7M segment maintained healthy movement despite increased buyer selectivity, while transactions above \$7M remained more limited and relationship-driven.

Overall, the distribution reflects a disciplined luxury market where affluent buyers continue prioritizing long-term value, execution certainty, and lifestyle quality.

MARKET POSITIONING – APRIL 2026

Inventory
Expanding

Buyer Demand
Disciplined

Pricing
Stabilizing

MARKET POSITIONING

April 2026 Ultra-Luxury Segment

April market conditions reflected a more balanced and sustainable ultra-luxury environment across Davidson County entering Q2.

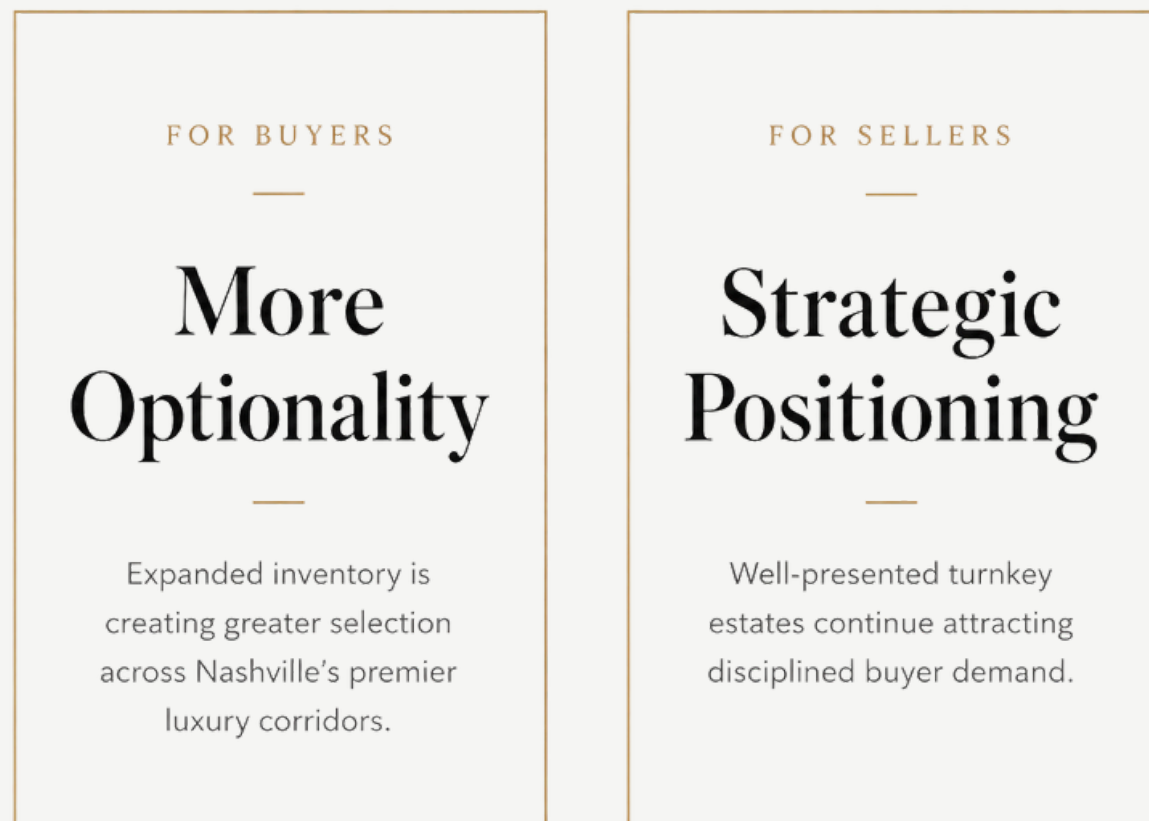
Inventory expansion continued as 47 new ultra-luxury listings entered the market, providing affluent buyers with increased optionality across Nashville's premier residential corridors.

Despite rising supply levels, buyer demand remained disciplined and highly active for well-positioned turnkey estates offering architectural quality, privacy, and long-term location value.

Pricing conditions continued stabilizing following March's anomaly-driven surge, reinforcing a healthier luxury market rhythm supported by strategic pricing and sustained buyer confidence.

Rather than signaling weakness, the current environment reflects a more normalized and competitive luxury landscape where presentation, execution quality, and lifestyle positioning remain critical to successful absorption.

WHAT THIS MEANS FOR BUYERS & SELLERS – APRIL 2026



WHAT THIS MEANS FOR BUYERS & SELLERS

April 2026 Ultra-Luxury Segment

April market conditions continue supporting both disciplined buyers and strategically positioned sellers across Davidson County's ultra-luxury segment.

For buyers, inventory expansion is creating increased optionality across multiple luxury tiers, providing greater flexibility when evaluating location, architectural quality, privacy, and long-term lifestyle positioning.

At the same time, affluent buyer demand remains highly active for turnkey estates offering strong presentation, established neighborhood positioning, and execution certainty.

For sellers, the current environment reinforces the importance of strategic pricing, elevated presentation, and architectural differentiation as buyer selectivity continues increasing entering Q2.

Overall, the market remains balanced and highly functional — rewarding preparation, quality, and long-term value positioning on both sides of the transaction.

ACTIVE HIGHLIGHT

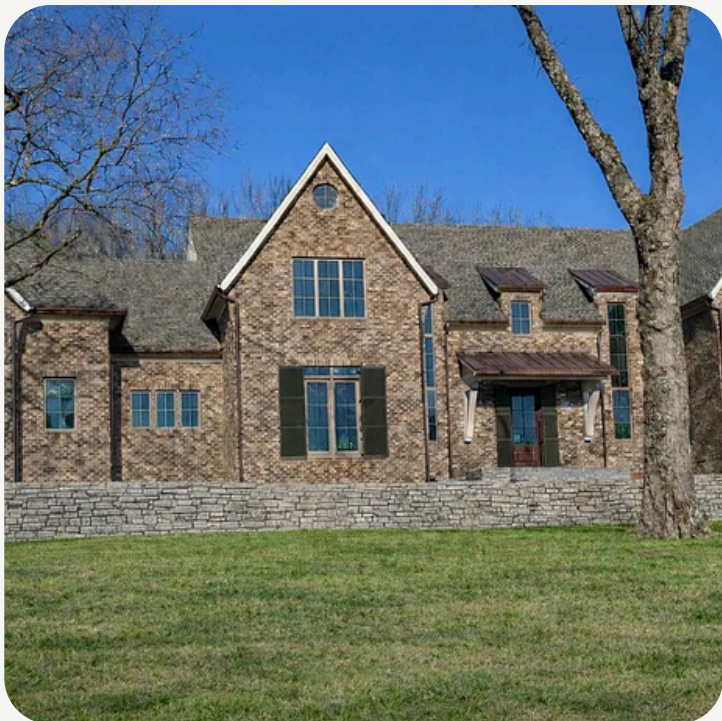
5623 Hillsboro Pike — Forest Hills

List Price: \$23,500,000

- One of the most significant ultra-luxury listings introduced entering Q2
- Newly completed 8,180 sq ft estate built in 2023
- 5 bedrooms, 5 full baths, 2 half baths
- Nearly 5-acre Forest Hills legacy positioning
- Turnkey architectural execution commanding premium pricing



This listing reinforces growing demand for turnkey legacy estates offering architectural quality, privacy, and immediate lifestyle positioning within Nashville's premier luxury corridors.



CLOSED HIGHLIGHT

2700 Hemingway Drive — Tyne Meade

Sold Price: \$6,100,000 (Mar 30, 2026)

- Significant private-market luxury transfer within Tyne Meade
- 7,180 sq ft estate with established legacy positioning
- 5-bedroom luxury family estate
- Strong example of disciplined upper-tier buyer demand
- Reflects continued liquidity for well-positioned luxury inventory

This transaction highlights continued buyer confidence within Nashville's established luxury neighborhoods while reinforcing the growing importance of private-market and relationship-driven activity.

MARKET OUTLOOK – APRIL 2026



INVENTORY

Expanding



PRICING

Stabilizing



BUYER DEMAND

Selective

MARKET OUTLOOK

April 2026 Ultra-Luxury Segment

April market conditions continue shifting toward a more balanced and sustainable ultra-luxury environment entering Q2.

Inventory expansion is expected to continue across Nashville's premier luxury corridors, providing affluent buyers with increased optionality while reinforcing healthier long-term market conditions.

Pricing has begun stabilizing following March's anomaly-driven surge, while buyer demand remains active but increasingly selective toward turnkey estates offering architectural quality, privacy, and strong location positioning.

Looking ahead, the market is expected to remain disciplined and highly competitive, with presentation, pricing strategy, and execution quality continuing to drive absorption across the ultra-luxury segment.

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.

