

Prepared for
Nashville's Vertical
Property Owners

by Alexander Brandau IV

NASHVILLE LUXURY HIGH-RISE MARKET REPORT

MAY 2026

Q2 Continues At A Healthy Pace As Inventory Normalizes And Buyer
Demand Remains Resilient

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MARKET OVERVIEW

The Davidson County high-rise market continued its transition into a more balanced Q2 environment during May. Following April's surge in inventory and transactions, new listings moderated while buyer demand remained steady, demonstrating healthy market absorption and stable pricing conditions.

With 38 new listings and 13 closed sales recorded during the month, Nashville's luxury condo market maintained strong momentum. Premium properties continued attracting serious buyers, particularly within highly amenitized communities and luxury developments offering walkability, lifestyle, and elevated residential experiences.



KEY MARKET SIGNALS

- New listings moderated to 38 units, signaling inventory normalization after the spring surge.
- 13 closed sales confirmed continued buyer demand across Nashville's luxury condo market.
- Average active list price increased to \$1.28M, reflecting strength in premium inventory.
- Average price per square foot remained stable at \$808, reinforcing pricing consistency.
- Market conditions continue shifting toward balanced inventory and strategic pricing.

TOWER PERFORMANCE & PRICING ANALYSIS

The Nashville luxury high-rise market maintained healthy pricing throughout May despite a moderation in transaction volume. Inventory became more balanced across the market, while premium towers continued attracting buyers seeking walkability, luxury amenities, and elevated residential experiences.

Significant pricing separation remains evident among Nashville's vertical communities. Trophy assets at Four Seasons, The Viridian, and 505 Church continue setting the upper boundary of the market, while established luxury towers provide strong value opportunities across Downtown, Midtown, The Gulch, and West End.

| Building | Active Price Range | Avg \$/Sq Ft | Avg DOM | Activity |
|----------------|--------------------|--------------|---------|------------------|
| 505 Church | \$414.9k – \$12.0M | \$968 | 121 | 1 Sold |
| Icon Nashville | \$319.9k – \$995k | \$619 | 100 | 1 Sold |
| Four Seasons | \$1.29M – \$33.5M | \$2,318 | 122 | 1 Sold |
| Twelve Twelve | \$440k – \$960k | \$697 | 153 | 2 Sold |
| Rhythm | \$395k – \$1.15M | \$528 | 74 | 1 Under Contract |
| CityLights | \$985k – \$1.27M | \$589 | 61 | 1 Under Contract |
| The Viridian | \$339.9k – \$15.0M | \$720 | 104 | 1 Sold |
| The Adelia | \$435k – \$1.35M | \$642 | 74 | 3 Sold |
| Broadwest | \$754.5k – \$5.79M | \$1,083 | 202 | 2 Sold |
| Terrazzo | \$629.5k – \$1.1M | \$638 | 108 | 2 Active |
| The Pullman | \$439k – \$2.9M | \$790 | 44 | 20 Active |

May activity highlights continued demand for luxury urban living, with The Pullman leading active inventory while Four Seasons, The Adelia, and Broadwest recorded notable transaction activity.

APRIL vs. MAY 2026

The Nashville luxury high-rise market continued its transition toward a more balanced environment during May. Following April's strong transaction activity, inventory moderated while buyer demand remained steady, demonstrating healthy market absorption and pricing stability.

Although transaction volume eased from April's peak, average pricing and price-per-square-foot metrics remained remarkably consistent, reinforcing confidence across Nashville's luxury condo sector.

NEW LISTINGS

APRIL 2026 → MAY 2026
55 Units → 38 Units

Inventory moderated as the spring listing surge began to normalize, creating a more balanced marketplace.

CLOSED SALES

APRIL 2026 → MAY 2026
18 Sales → 13 Sales

Buyer demand remained healthy despite a slower pace, with transactions continuing across Nashville's luxury towers.

AVG LIST PRICE

APRIL 2026 → MAY 2026
\$1.24M → \$1.28M

Average pricing increased slightly as premium inventory continued to dominate active listings.

AVG PRICE PER SQ FT

APRIL 2026 → MAY 2026
\$817 → \$808

Price-per-square-foot valuations remained stable, reinforcing the pricing floor established earlier in 2026.

MARKET TAKEAWAY

The market is settling into a healthy mid-year rhythm. Inventory growth has moderated, pricing remains stable, and buyer activity continues across multiple luxury communities. Sellers who combine strategic pricing with strong presentation remain best positioned for success.

NOTABLE TRANSACTIONS



**Notable
Active
Listing**

505 Church St. — Downtown

\$12,000,000

2 Beds | 2 Baths | 4,374 Sq. Ft.



**Highest
Closed
Sale**

Four Seasons Residences — Downtown

\$2,900,000

1,524 Sq. Ft.

Ultra-luxury activity remained concentrated among trophy assets, with record-setting listings and premium sales continuing to define Nashville's highest-end condominium segment.

Q2 MARKET OUTLOOK



As Q2 progresses, Nashville's luxury high-rise market remains balanced. Inventory growth has slowed from the spring surge, while buyer demand continues supporting healthy transaction activity across premium communities.

Buyers are becoming more selective, placing greater emphasis on pricing, presentation, amenities, and overall building positioning. Well-priced properties continue attracting attention, while overpriced inventory faces longer marketing times.

The ultra-luxury segment remains strong, with trophy listings at 505 Church, The Viridian, and Four Seasons reinforcing confidence in Nashville's highest-end condominium market.

Luxury condo demand remains resilient as inventory normalizes and pricing stays remarkably stable across Nashville's leading towers.

WHY LIST WITH Alexander Brandau IV

Nashville's vertical market is shifting — and representation matters more than ever. Alexander's precision marketing, record of elite closings, and understanding of high-rise buyer psychology deliver results that rise above market trends.



Whether selling in the Gulch, Midtown, or West End, Alexander and his team tailor each strategy to maximize your property's story and value.

Thinking about selling or curious what your condo is worth?

Scan the QR code to schedule a private consultation with Alexander and explore your property's market potential.

