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DAVIDSON COUNTY
ULTRA-LUXURY MARKET REPORT
MAY 2026

EXECUTIVE SUMMARY

May marked the strongest month of 2026 for Davidson County's ultra-luxury market, with inventory expansion met by exceptionally strong buyer demand and record transaction volume.

A total of 67 new ultra-luxury listings entered the market while buyers completed 35 successful closings, representing the highest monthly activity level recorded this year. Despite increased inventory, pricing remained stable within the market's transactional core. The average closed sale reached approximately \$3.53M, while average pricing settled at \$618 per square foot, reflecting a healthier and more sustainable market environment.

Turn-key estates, architectural quality, and lifestyle-driven properties continued commanding the market's strongest premiums as affluent buyers prioritized immediate usability and long-term value.

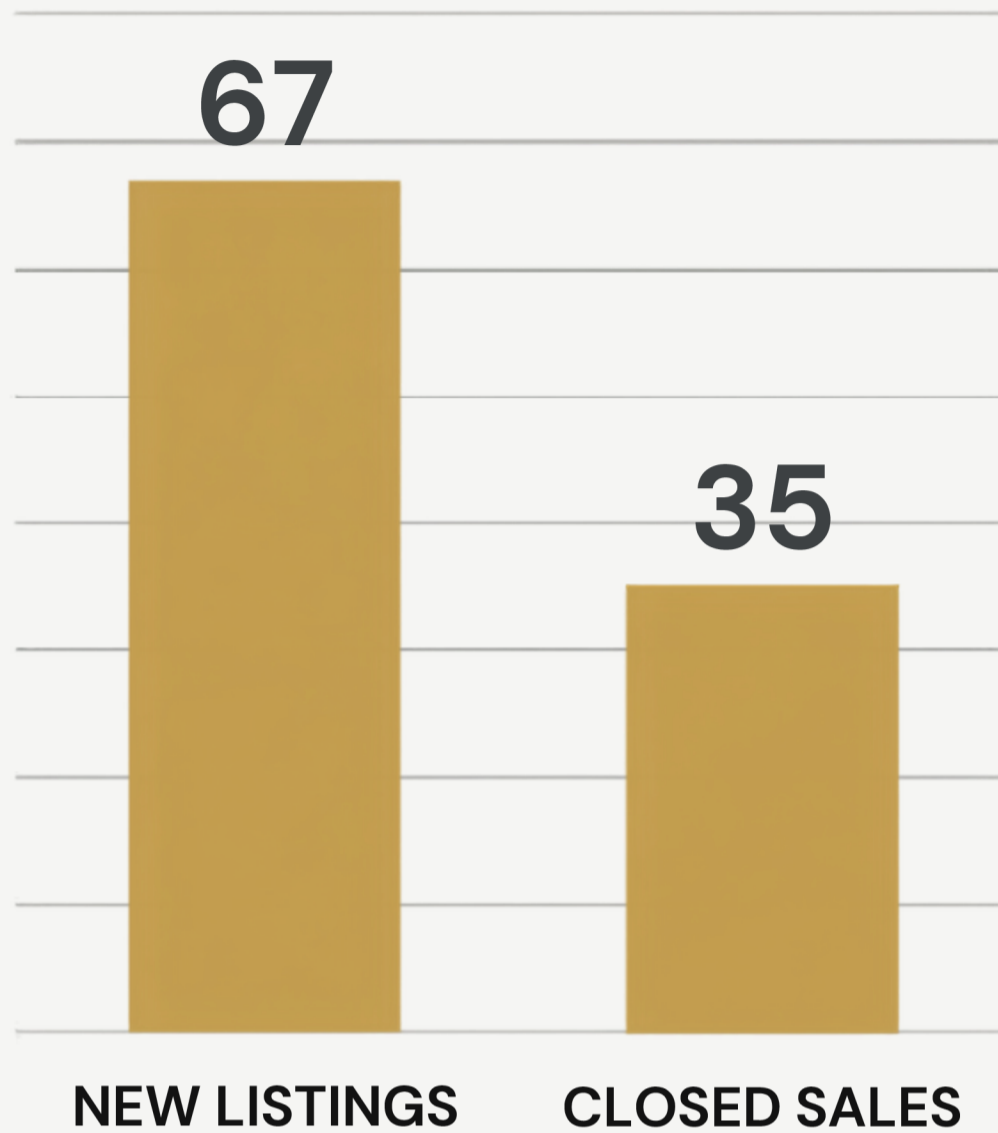
The \$3M–\$6M segment remains the transactional core of Davidson County's ultra-luxury market, generating the highest concentration of buyer activity and successful closings.



KEY METRICS

MAY 2026 ULTRA-LUXURY MARKET SNAPSHOT

NEW LISTINGS	CLOSED SALES	AVG CLOSED PRICE	AVG \$/SQFT
67	35	\$3.53M	\$618
TRANSACTIONAL CORE			
\$3M–\$6M			



MARKET ACTIVITY

May 2026 Ultra-Luxury Segment

May marked the strongest month of 2026 for Davidson County's ultra-luxury market, with inventory growth matched by exceptional buyer demand and record transaction volume.

Inventory expansion accelerated significantly as 67 new ultra-luxury listings entered the market, representing the highest monthly influx of new inventory recorded this year across Nashville's premier luxury corridors.

Buyer activity remained remarkably resilient as 35 properties successfully closed, demonstrating strong absorption despite expanding supply and confirming that demand remains active at the upper end of the market.

The combination of record inventory growth and record transaction volume signals a healthy, highly liquid luxury market environment entering the summer season.

PRICING ANALYSIS - MAY 2026

\$3.53M

Average Closed Price

\$618

Average \$ / Sq Ft

PRICING TRENDS

May 2026 Ultra-Luxury Segment

May pricing metrics reflected a highly active yet increasingly balanced ultra-luxury market as inventory expansion was matched by exceptional transaction volume.

The average closed sale price reached approximately \$3.53M, reinforcing the continued strength of Davidson County's transactional core despite a significant increase in available inventory.

Average pricing per square foot settled near \$618, representing a healthier and more sustainable pricing environment compared to the elevated figures often created by one-off ultra-premium land and legacy estate transactions.

Affluent buyers continue demonstrating strong willingness to pay premiums for architectural quality, privacy, turnkey execution, and established neighborhood positioning throughout Nashville's premier luxury corridors.

The strongest transaction liquidity remains concentrated within the \$3M-\$6M range, where buyer activity and successful closings continue occurring at the highest levels within the ultra-luxury segment.

MARKET VELOCITY – MAY 2026

35

Successful Closings

\$3M–\$6M

Transactional Core

MARKET VELOCITY

May 2026 Ultra-Luxury Segment

May represented the highest transaction velocity recorded within Davidson County's ultra-luxury market during 2026, with 35 successful closings completed throughout the month.

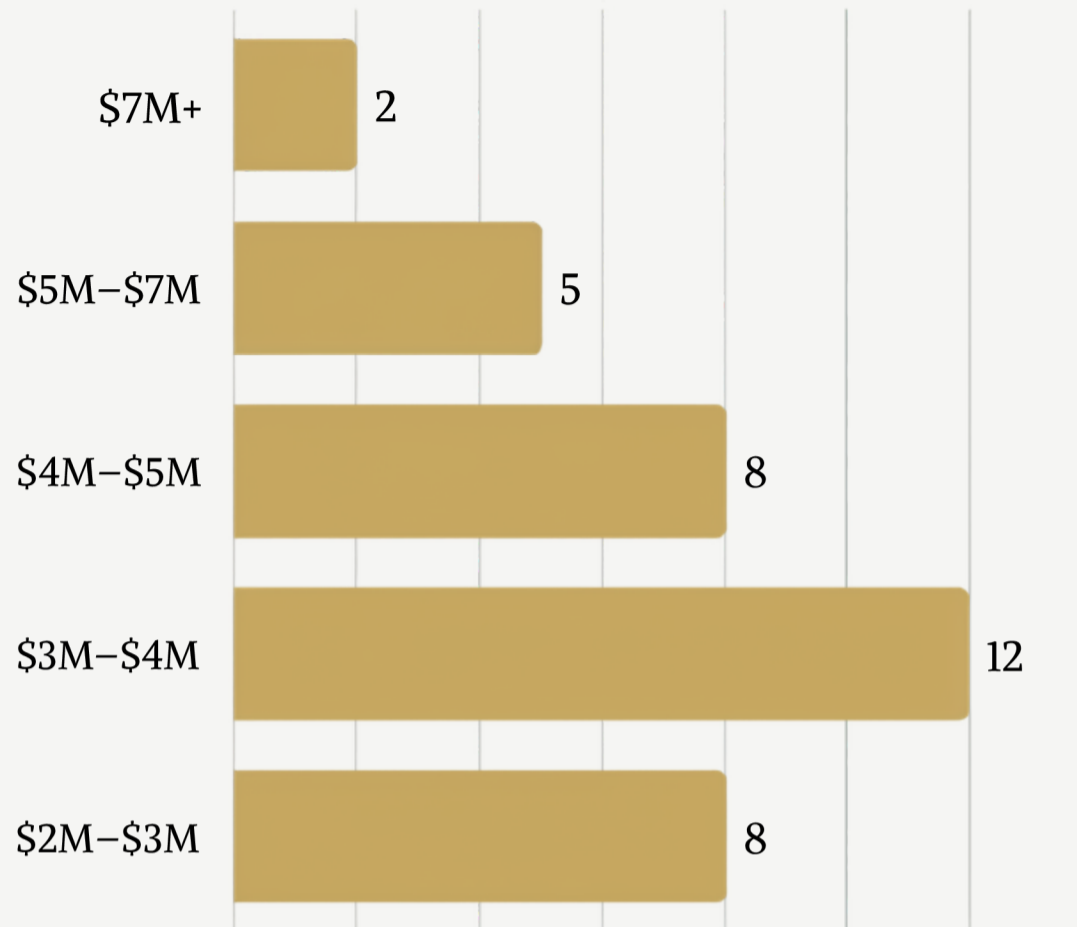
Despite inventory reaching a yearly high of 67 new listings, buyer activity remained exceptionally resilient, demonstrating strong absorption across Nashville's premier luxury corridors.

The market's strongest liquidity continued concentrating within the \$3M–\$6M price range, where properly positioned properties consistently attracted qualified buyers and generated the majority of successful transactions.

At the upper end of the market, demand remained active for both turnkey luxury estates and strategic land acquisitions, highlighting the depth and diversity of buyer motivations.

The combination of record inventory growth and record transaction volume reinforces a healthy and highly functional luxury market environment entering the summer season.

TRANSACTION BREAKDOWN - MAY 2026



PRICE DISTRIBUTION

May 2026 Ultra-Luxury Segment

May transaction activity remained concentrated within the \$3M-\$5M range, reinforcing its role as Davidson County's primary source of ultra-luxury liquidity.

The \$3M-\$4M segment led activity with 12 closings, while the \$2M-\$3M and \$4M-\$5M brackets each recorded eight transactions, reflecting broad buyer participation across the market's core price ranges.

Demand remained strongest for turnkey homes, architectural quality, and established neighborhood locations that offer long-term value.

The \$5M-\$7M segment recorded five closings, while transactions above \$7M remained limited but continued to represent meaningful activity within the legacy-estate market.

Overall, May's distribution highlights a healthy, highly liquid luxury market with demand concentrated in the transactional core.

MARKET POSITIONING - MAY 2026

Inventory PEAK 2026	Buyer Demand ACTIVE	Pricing STABLE
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MARKET POSITIONING

May 2026 Ultra-Luxury Segment

May market conditions reflected Davidson County's strongest ultra-luxury environment of 2026, with record inventory growth matched by exceptional buyer activity.

Inventory reached its highest level of the year as 67 new ultra-luxury listings entered the market, providing buyers with expanded selection across Nashville's premier luxury corridors.

Despite increased supply, buyer demand remained highly active, generating 35 successful closings and demonstrating strong absorption throughout the market's transactional core.

Pricing conditions remained stable as average closed pricing held near \$3.53M, reinforcing a healthy and sustainable luxury market environment despite expanding inventory.

Rather than signaling imbalance, May's performance reflects a highly functional luxury market where inventory growth, buyer demand, and pricing stability remain aligned.

WHAT THIS MEANS FOR BUYERS & SELLERS - MAY 2026

FOR BUYERS

More Opportunity

Record inventory levels creating greater selection across Davidson County's premier luxury corridors.

FOR SELLERS

Strong Demand

Qualified buyers remain active, with 35 successful closings demonstrating continued market absorption.

WHAT THIS MEANS FOR BUYERS & SELLERS

May 2026 Ultra-Luxury Segment

May market conditions continue supporting both active buyers and strategically positioned sellers across Davidson County's ultra-luxury market.

For buyers, inventory reached its highest level of 2026, creating expanded opportunities across multiple price points and luxury neighborhoods while increasing available selection.

Despite greater inventory, buyer demand remained exceptionally strong, generating 35 successful closings and reinforcing continued confidence in well-positioned luxury properties.

For sellers, the current environment highlights the importance of presentation, pricing strategy, and architectural differentiation as buyers become more selective with increased options.

Overall, May reflects a healthy and highly functional luxury market where increased opportunity and strong demand continue to coexist.

NOTABLE PROPERTIES - MAY 2026

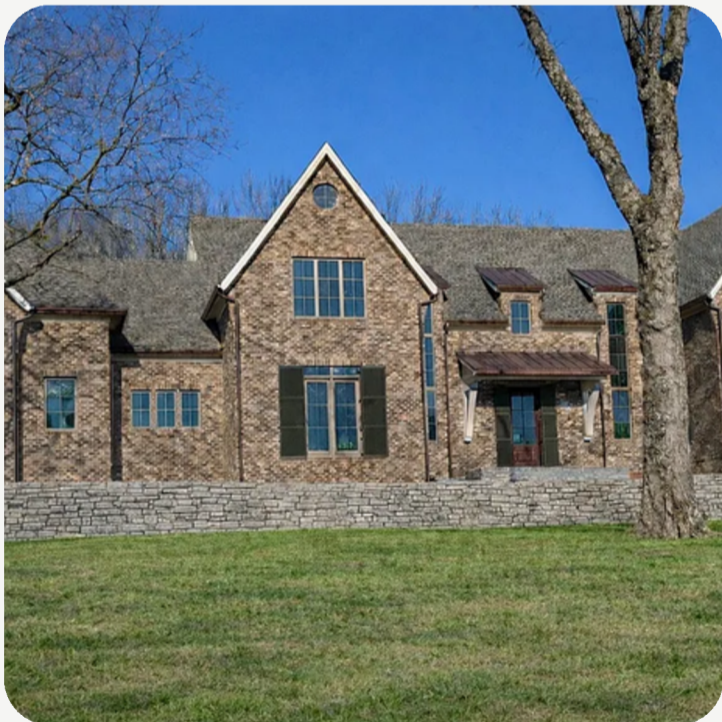
ACTIVE HIGHLIGHT

2803 Hemingway Drive — Tyne Meade **List Price: \$4,850,000**

- Featured active luxury listing for the May 2026 report
- 7,268 sq ft estate in Tyne Meade
- 5 bedrooms | 5 full baths | 1 half bath
- Turnkey architectural execution in an established luxury neighborhood
- Reflects continued demand for move-in-ready luxury properties



This listing highlights the market's preference for turnkey homes offering architectural quality, privacy, and established neighborhood positioning.






CLOSED HIGHLIGHT

113 Bellevue Drive — Belle Meade **Sold Price: \$4,800,000 (Closed May 2026)**

- Featured closed sale for the May 2026 report
- 6,251 sq ft estate built in 2023
- 5 bedrooms | 5 full baths | 1 half bath
- Strong example of continued buyer demand despite increased inventory
- Reinforces liquidity within the market's transactional core

This transaction demonstrates that qualified buyers remain highly active for well-positioned luxury properties in Davidson County's premier neighborhoods.

MARKET OUTLOOK – MAY 2026

INVENTORY	PRICING	BUYER DEMAND
 Peak 2026	 Stable	 Active

MARKET OUTLOOK

May 2026 Ultra-Luxury Segment

May confirmed Davidson County's ultra-luxury market remains highly active, with record inventory growth matched by strong buyer demand.

Inventory reached its highest level of 2026, providing expanded selection across Nashville's premier luxury corridors.

Pricing remained stable despite increased supply, reinforcing continued confidence within the market's \$3M–\$6M transactional core.

Looking ahead, buyer activity is expected to remain active but selective, with presentation, pricing strategy, and neighborhood positioning continuing to drive results.

The strongest opportunities remain concentrated in turnkey homes and established luxury neighborhoods.

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.

