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DAVIDSON COUNTY ULTRA-LUXURY MARKET REPORT JUNE 2026

EXECUTIVE SUMMARY

June closed the second quarter with Davidson County's ultra-luxury market maintaining strong transaction activity despite a seasonal slowdown in new inventory.

A total of 36 new ultra-luxury listings entered the market while 29 successful closings generated \$109.7 million in sales volume. Average closed price reached approximately \$3.78M, with homes selling at an average of \$635 per square foot, reflecting a healthy and disciplined luxury market.

Inventory expanded to 207 active luxury properties, creating the strongest buyer selection seen in recent years while maintaining consistent transaction volume throughout the quarter.

The \$2.5M-\$4M price range continued serving as Davidson County's primary transactional core, reinforcing that properly priced luxury homes remain the foundation of today's ultra-luxury market.

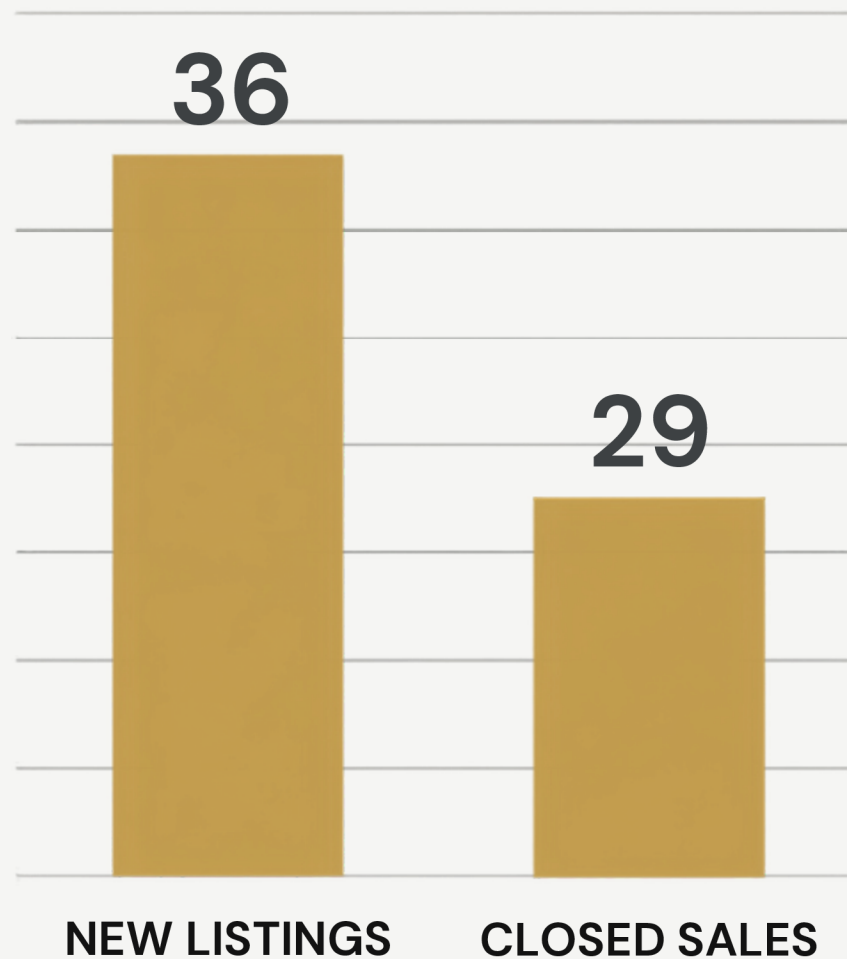


KEY METRICS

MAY 2026 ULTRA-LUXURY MARKET SNAPSHOT

NEW LISTINGS	CLOSED SALES	AVG CLOSED PRICE	AVG \$/SQFT
36	29	\$3.78M	\$635
TRANSACTIONAL CORE			
\$2.5M-\$4M			

MARKET PULSE – JUNE 2026



MARKET ACTIVITY

June 2026 Ultra-Luxury Segment

June closed the second quarter with 36 new ultra-luxury listings entering Davidson County while 29 luxury properties successfully closed, demonstrating continued buyer activity despite a seasonal slowdown in new inventory.

Although June produced fewer new listings than April and May, transaction volume remained remarkably steady, generating \$109.7 million in closed sales and reinforcing the market's healthy absorption rate.

Buyer demand remained disciplined as qualified purchasers continued targeting well-positioned luxury homes, particularly within the \$2.5M–\$4M price range that drove the majority of quarterly activity.

The combination of stable closings, expanding inventory, and balanced pricing reflects a healthy ultra-luxury market entering the second half of 2026 with increased opportunities for buyers and disciplined conditions for sellers.

PRICING ANALYSIS - JUNE 2026

\$3.78M

Average Closed Price

\$702

Average \$ / Sq Ft

PRICING TRENDS

June 2026 Ultra-Luxury Segment

June pricing reflected continued strength across Davidson County's ultra-luxury market despite a seasonal moderation in new inventory.

The average closed sale price increased to approximately \$3.78M, supported by several high-value transactions while reinforcing the market's healthy transactional core.

Average price per square foot rose to \$702, reflecting continued buyer willingness to pay premiums for architectural quality, turnkey execution, and desirable luxury neighborhoods.

Qualified buyers remained focused on well-positioned properties offering privacy, lifestyle amenities, and long-term value throughout Nashville's premier luxury corridors.

The strongest transaction activity continued concentrating within the \$3M-\$6M range, where pricing discipline and consistent buyer demand maintained a balanced luxury market.

MARKET VELOCITY – JUNE 2026

29

Successful Closings

\$2.5M–\$4M

Transactional Core

MARKET VELOCITY

June 2026 Ultra-Luxury Segment

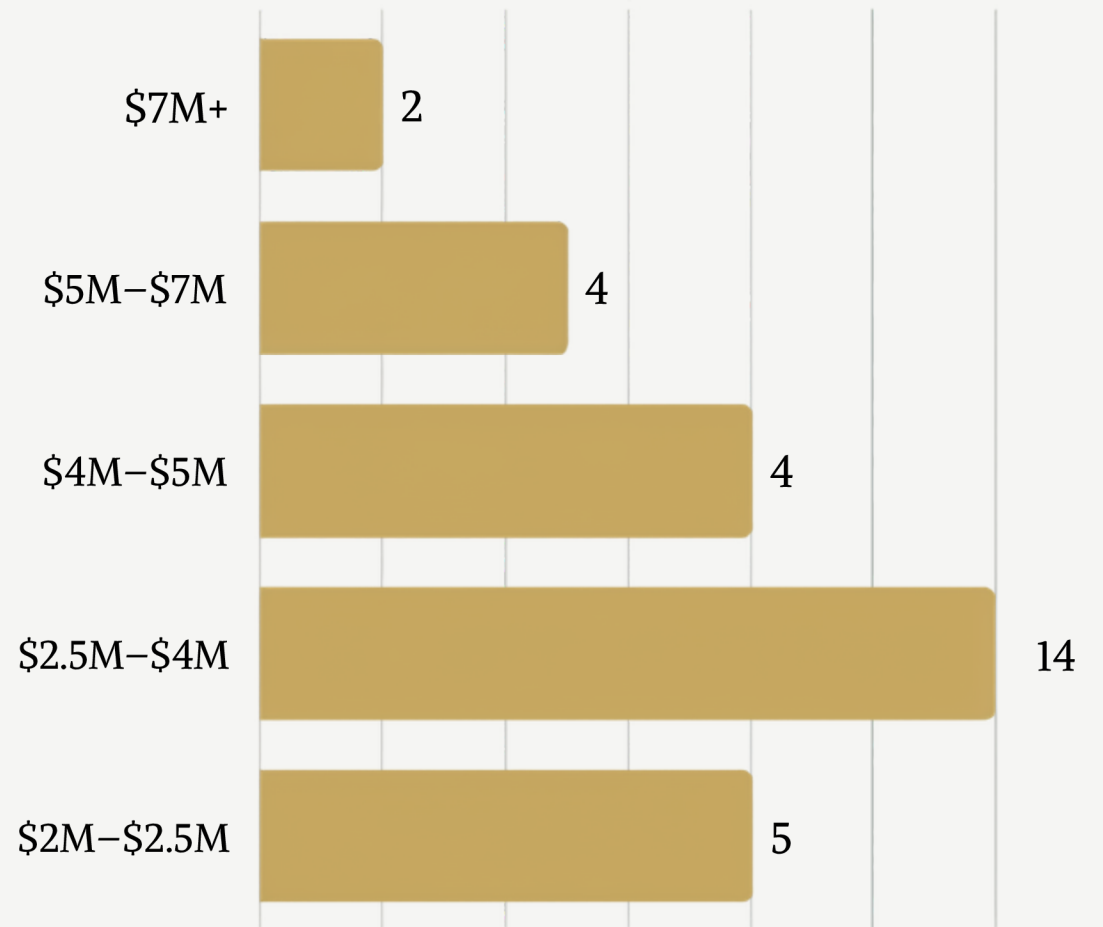
June maintained healthy transaction velocity across Davidson County's ultra-luxury market, with 29 successful closings despite a seasonal slowdown in new inventory.

Buyer activity remained disciplined throughout the month, demonstrating continued absorption of well-positioned luxury properties across Nashville's premier neighborhoods.

The market's strongest liquidity shifted toward the \$2.5M–\$4M price range, where qualified buyers completed the majority of June's transactions. Demand remained active for turnkey homes offering architectural quality, privacy, and established neighborhood positioning, while larger legacy-estate transactions continued to occur selectively.

Overall, June reinforced a balanced luxury market entering the second half of 2026, supported by steady buyer confidence and healthy transaction activity.

TRANSACTION BREAKDOWN - JUNE 2026



PRICE DISTRIBUTION

June 2026 Ultra-Luxury Segment

June transaction activity concentrated within the \$2.5M-\$4M range, reinforcing it as Davidson County's primary source of ultra-luxury liquidity.

The \$2.5M-\$4M segment led the market with 14 closings, while the \$2M-\$2.5M, \$4M-\$5M, and \$5M-\$7M brackets maintained steady buyer participation.

Demand remained strongest for turnkey homes, architectural quality, and established luxury neighborhoods that continue attracting qualified buyers. Transactions above \$7M remained selective but meaningful, reflecting the relationship-driven nature of Davidson County's highest-end legacy-estate market.

Overall, June's distribution highlights a balanced luxury market with buyer activity concentrated in the market's transactional core.

MARKET POSITIONING - JUNE 2026

Inventory	Buyer Demand	Pricing
BALANCED	DISCIPLINED	STABLE

MARKET POSITIONING

June 2026 Ultra-Luxury Segment

June market conditions reflected a more balanced ultra-luxury environment as inventory moderated while buyer activity remained steady.

With 36 new ultra-luxury listings, inventory eased from May's annual high, creating a healthier balance between available supply and qualified buyer demand.

Despite fewer new listings, 29 successful closings demonstrated continued absorption of well-positioned luxury homes across Davidson County's premier neighborhoods.

Pricing remained stable, supported by an average closed sale price of \$3.78M, reinforcing buyer confidence despite seasonal market moderation.

Overall, June's performance reflects a disciplined luxury market where balanced inventory, stable pricing, and qualified demand continue supporting healthy transaction activity.

WHAT THIS MEANS FOR BUYERS & SELLERS - JUNE 2026

FOR BUYERS

Balanced Choices

Inventory moderated while selection remained healthy across Davidson County's premier luxury neighborhoods.

FOR SELLERS

Qualified Demand

Serious buyers remained active, with 29 successful closings supporting continued market confidence.

WHAT THIS MEANS FOR BUYERS & SELLERS

June 2026 Ultra-Luxury Segment

June market conditions continued supporting both disciplined buyers and strategically positioned sellers across Davidson County's ultra-luxury market.

For buyers, a healthier inventory balance created quality opportunities across the \$2.5M–\$4M segment while maintaining access to premier luxury neighborhoods.

Buyer demand remained steady despite seasonal moderation, with qualified purchasers continuing to compete for turnkey homes offering architectural quality and long-term value.

For sellers, pricing accuracy, presentation, and neighborhood positioning remained key differentiators as buyers became increasingly selective.

Overall, June reflects a balanced luxury market where healthy inventory and disciplined demand continue supporting successful transactions.

NOTABLE PROPERTIES - JUNE 2026

ACTIVE HIGHLIGHT

116 Brookfield Ave — Highlands of Belle Meade
List Price: \$3,999,000

- Featured active listing for the June 2026 market report
- 5,853 sq ft estate built in 2018
- 5 bedrooms | 4 full baths | 1 half bath
- Listed at \$683/sq ft
- Strategically priced using a same-street comparable sale



This listing highlights how disciplined pricing and neighborhood data continue to drive buyer confidence across Davidson County's most active luxury price category.



CLOSED HIGHLIGHT

614 Lynnwood Blvd — Belle Meade
Sold Price: \$4,299,999 (Closed June 17, 2026)

- Featured closed sale for the June 2026 market report
- 3,742 sq ft Belle Meade estate on 2.01 acres
- 4 Bedrooms | 3 Full Baths | 1 Half Bath
- Belle Meade location with guest house and in-ground pool
- Closed in just 32 days
- Closed at full asking price

This sale demonstrates continued demand for well-positioned luxury homes in Belle Meade. Closing at full asking price in just 32 days reinforces that properly priced homes continue attracting qualified buyers despite a more balanced market.

MARKET OUTLOOK – JUNE 2026

INVENTORY	PRICING	BUYER DEMAND
		
Balanced	Stable	Selective

MARKET OUTLOOK

June 2026 Ultra-Luxury Segment

June closed the second quarter with a balanced ultra-luxury market supported by steady buyer activity and healthy pricing.

Inventory moderated from May's annual high, providing buyers with quality opportunities while maintaining a competitive environment for well-positioned listings.

Pricing remained stable as qualified buyers continued pursuing turnkey homes in established luxury neighborhoods despite seasonal slowing.

Looking ahead, the market is expected to remain disciplined through the summer, with pricing strategy, presentation, and neighborhood positioning continuing to drive successful transactions.

The strongest opportunities are expected to remain within the \$2.5M–\$4M segment, where buyer demand has remained the most consistent throughout Q2.

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.

