



Prepared by Alexander Brandau IV
Aperture Global Real Estate

DAVIDSON COUNTY

ULTRA-LUXURY MARKET REPORT

JULY 2026

EXECUTIVE SUMMARY

July opened the third quarter with Davidson County's luxury market remaining resilient as buyer demand kept pace with new inventory and seller leverage quietly strengthened.

A total of 65 new luxury listings entered the market while 55 successful closings generated \$128.3 million in sales volume. Sellers achieved an average of 97.7% of list price, reflecting stronger pricing power despite normal seasonal moderation.

Inventory remained healthy at approximately 4.4 months of supply, providing buyers with quality selection while allowing well-priced luxury homes to continue selling efficiently.

The \$1.5M–\$2.5M price range continued serving as Davidson County's primary transactional core, producing over 70% of July's closings and reinforcing sustained demand for well-positioned luxury properties.

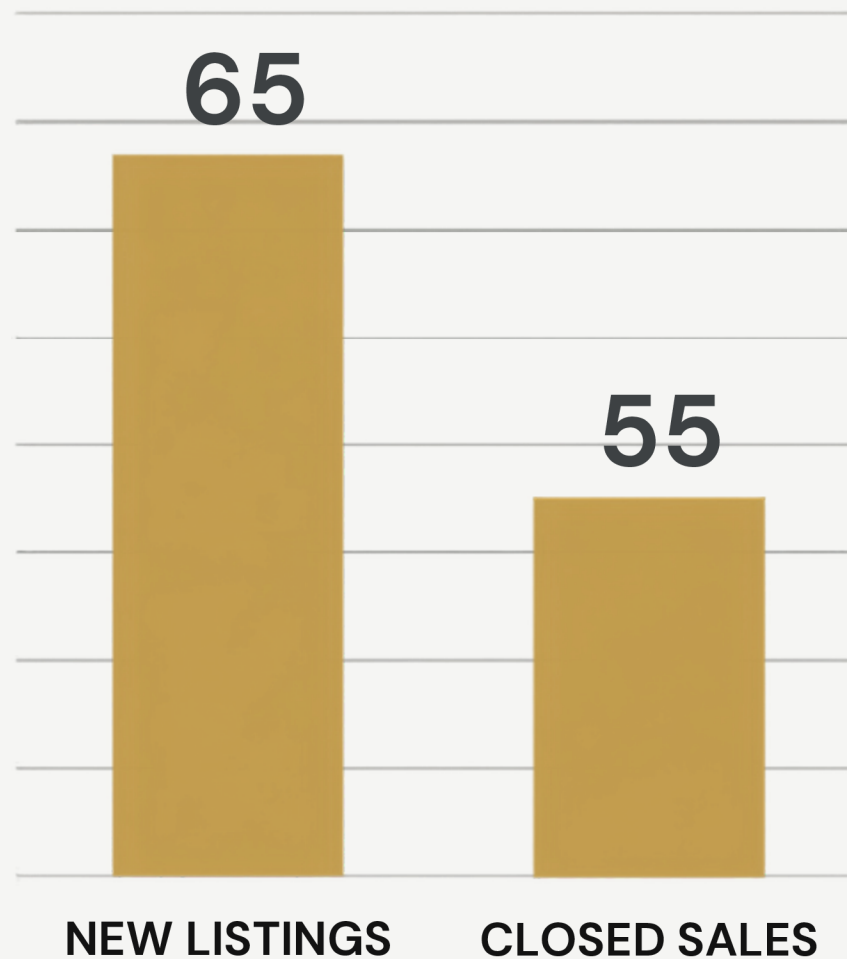


KEY METRICS

MAY 2026 ULTRA-LUXURY MARKET SNAPSHOT

NEW LISTINGS	CLOSED SALES	AVG CLOSED PRICE	AVG \$/SQFT
65	55	\$2.33M	\$516
TRANSACTIONAL CORE			
\$1.5M–\$2.5M			

MARKET PULSE - JULY 2026



MARKET ACTIVITY

July 2026 Ultra-Luxury Segment

July maintained strong market momentum with 65 new luxury listings entering the Davidson County market while 55 homes successfully closed, demonstrating resilient buyer demand despite the normal seasonal slowdown.

Although new inventory moderated from the second-quarter monthly average, buyer activity remained healthy, generating \$128.3 million in closed sales. Improved seller leverage was reflected in a 97.7% average sale-to-list ratio, the strongest pricing performance recorded in the current dataset.

The majority of transactions occurred within the \$1.5M–\$2.5M price range, reinforcing this segment as Davidson County's primary luxury transaction engine while higher price tiers remained more selective.

Overall, July's activity reflects a healthy luxury market where balanced inventory, disciplined pricing, and qualified buyer demand continue supporting consistent transaction volume as the third quarter begins.

PRICING ANALYSIS - JULY 2026

\$2.33M

Average Closed Price

\$516

Average \$ / Sq Ft

PRICING TRENDS

July 2026 Ultra-Luxury Segment

July pricing reflected a healthy luxury market where disciplined pricing and qualified buyer demand continued supporting strong seller outcomes despite seasonal moderation.

The average closed sale price reached \$2.33 million, while buyers paid an average of \$516 per square foot, illustrating steady demand across Davidson County's \$1.5M–\$5M luxury segment.

Although average pricing moderated from June, sellers achieved an impressive 97.7% sale-to-list ratio, demonstrating that accurately priced luxury homes continued attracting motivated buyers with minimal negotiation.

Well-positioned homes featuring quality construction, desirable locations, and turnkey presentation remained the strongest performers, while buyers became increasingly selective in higher price categories.

Overall, July reinforced that pricing success is being driven less by rapid appreciation and more by strategic pricing, strong presentation, and sustained buyer confidence throughout Davidson County's luxury market.

MARKET VELOCITY - JULY 2026

55

Successful Closings

\$1.5M–\$2.5M

Transactional Core

MARKET VELOCITY

July 2026 Ultra-Luxury Segment

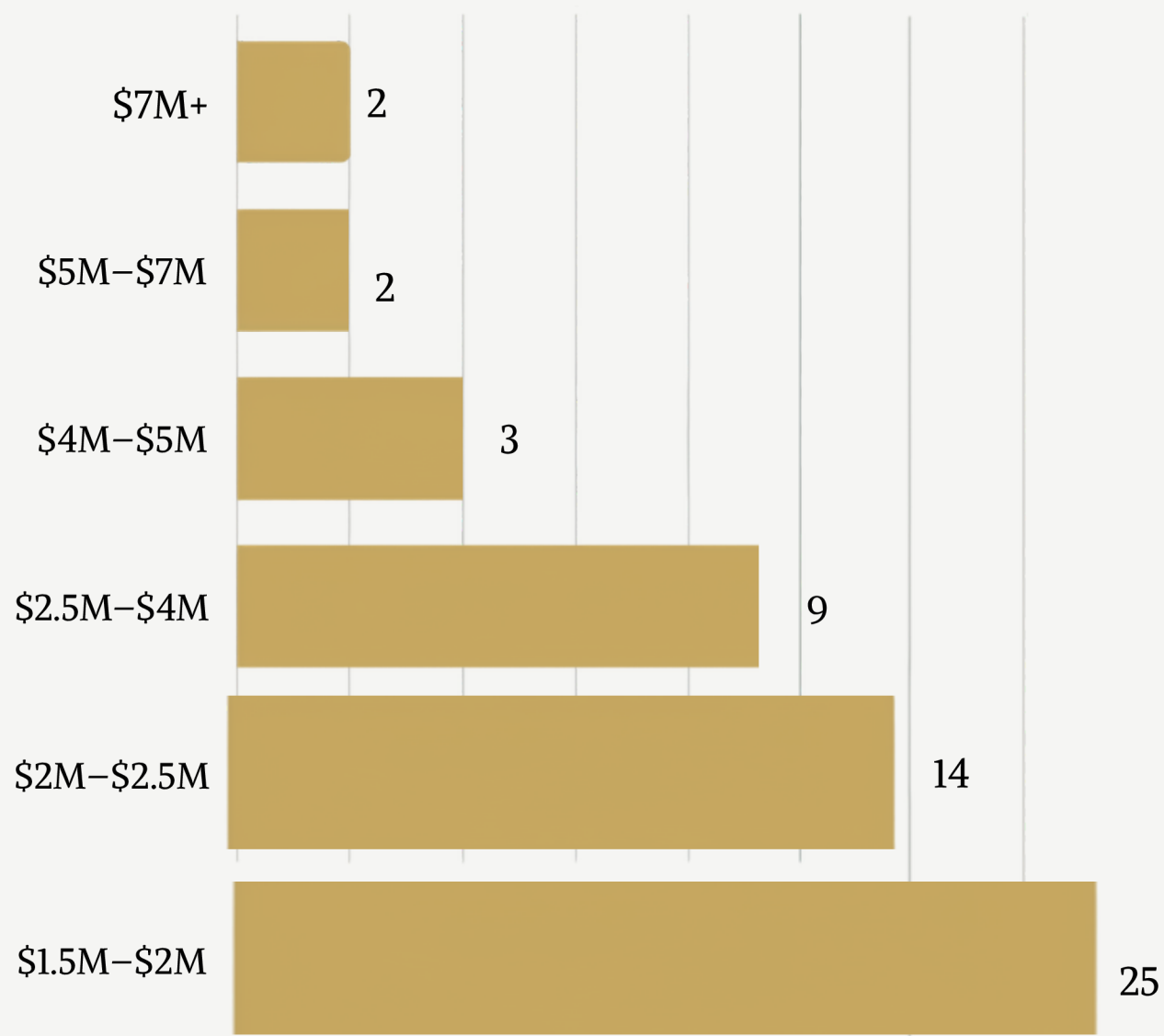
July maintained strong transaction velocity across Davidson County's luxury market, with 55 successful closings demonstrating sustained buyer activity despite the seasonal pace of summer.

Buyer demand remained resilient throughout the month, supported by healthy inventory levels and a 97.7% average sale-to-list ratio, reflecting continued competition for well-priced luxury homes.

The market's strongest liquidity centered within the \$1.5M–\$2.5M price range, where qualified buyers completed the majority of July's transactions. Higher price categories remained active but experienced a more selective pace as buyers prioritized value, location, and turnkey condition.

Overall, July reinforced a disciplined luxury market where balanced inventory, strategic pricing, and qualified buyer demand continued supporting healthy transaction velocity entering the second half of 2026.

TRANSACTION BREAKDOWN - JULY 2026



PRICE DISTRIBUTION

July 2026 Ultra-Luxury Segment

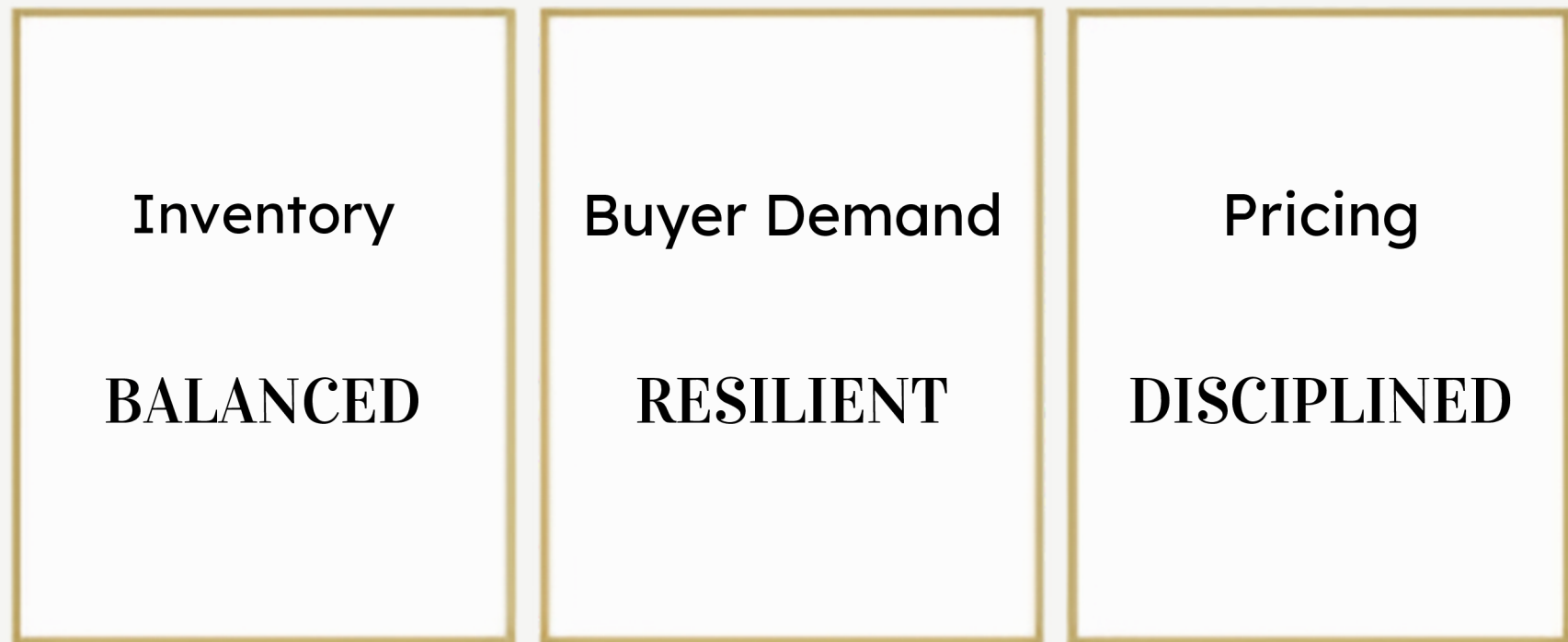
July transaction activity centered within the \$1.5M–\$2.5M range, reinforcing it as Davidson County's primary luxury transaction core.

The \$1.5M–\$2M segment led the market with 25 closings, while \$2M–\$2.5M added 14 transactions, accounting for over 70% of July's luxury sales.

Demand remained strongest for well-priced, turnkey homes in desirable neighborhoods, while transactions above \$5 million continued at a more selective pace.

Overall, July's distribution reflects a healthy luxury market with buyer activity concentrated in its core price ranges and sustained demand for premium properties.

MARKET POSITIONING - JULY 2026



MARKET POSITIONING

July 2026 Ultra-Luxury Segment

July's luxury market remained well-balanced as healthy inventory levels continued meeting resilient buyer demand across Davidson County's premier neighborhoods.

With 65 new luxury listings and 55 successful closings, the market maintained consistent transaction activity while providing buyers with greater selection and sellers with improved pricing leverage.

Buyer demand remained strongest within the \$1.5M–\$2.5M price range, while higher price categories continued attracting qualified purchasers at a more selective pace.

Pricing remained disciplined throughout the month, supported by a 97.7% average sale-to-list ratio, reinforcing that well-positioned luxury homes continued achieving strong results.

Overall, July reflects a healthy luxury market where balanced inventory, resilient buyer demand, and disciplined pricing continue supporting consistent transaction activity entering the second half of 2026.

WHAT THIS MEANS FOR BUYERS & SELLERS - JULY 2026

FOR BUYERS

More Selection

Balanced inventory created more opportunities while qualified buyers continued finding value in Davidson County's luxury market.

FOR SELLERS

Stronger Leverage

Well-priced homes continued attracting qualified buyers, with sellers averaging 97.7% of list price.

WHAT THIS MEANS FOR BUYERS & SELLERS

July 2026 Ultra-Luxury Segment

July market conditions continued creating opportunities for both qualified buyers and strategically positioned sellers across Davidson County's luxury market.

For buyers, balanced inventory provided greater selection, particularly within the \$1.5M–\$2.5M segment, while desirable homes continued selling quickly when priced appropriately.

For sellers, resilient buyer demand and a 97.7% average sale-to-list ratio reinforced the importance of strategic pricing and strong presentation to maximize results.

Overall, July reflects a healthy luxury market where balanced inventory, resilient demand, and disciplined pricing continue creating favorable conditions for both buyers and sellers.

NOTABLE PROPERTIES - JUNE 2026

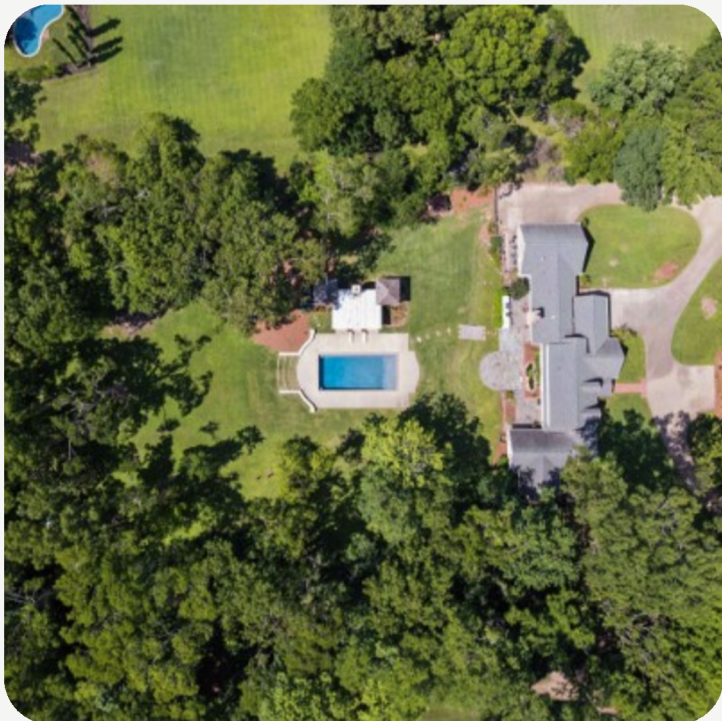
ACTIVE HIGHLIGHT

6230 Bresslyn Rd — West Meade Farms
List Price: \$4,950,000

- Featured active listing for the July 2026 market report
- 5,541 sq ft luxury home built in 2026
- 5 Bedrooms | 4 Full Baths | 1 Half Bath
- Listed at \$893/sq ft
- Brand-new 2026 luxury home in West Meade Farms



This listing reflects continued demand for premium new construction in Davidson County's luxury market. Exceptional design, quality finishes, and a premier West Meade location support its premium positioning.



CLOSED HIGHLIGHT

4911 Sewanee Rd — Oak Hill
Sold Price: \$4,500,000 (Closed July 24, 2026)

- Featured closed sale for the July 2026 market report
- 5,736 sq ft estate on 3.93 acres
- 4 Bedrooms | 3 Full Baths | 2 Half Baths
- Sold at \$785/sq ft
- Sold at 100% of list price in 41 days

This sale demonstrates the value of strategic pricing. Closing at full asking price in just 41 days reinforces that properly positioned luxury homes continue attracting qualified buyers despite increased inventory.

MARKET OUTLOOK - JULY 2026

INVENTORY	PRICING	BUYER DEMAND
		
Balanced	Disciplined	Resilient

MARKET OUTLOOK

July 2026 Ultra-Luxury Segment

July closed with a balanced luxury market supported by resilient buyer demand and disciplined pricing across Davidson County's premier neighborhoods.

Healthy inventory levels continue providing buyers with greater selection while allowing well-positioned sellers to achieve strong results through strategic pricing and presentation.

Looking ahead, market conditions are expected to remain balanced as qualified buyers continue prioritizing turnkey homes, desirable locations, and long-term value.

The strongest opportunities are expected to remain within the \$1.5M–\$2.5M segment, where transaction activity has remained the most consistent throughout the summer.

Overall, Davidson County's luxury market enters the coming months with healthy fundamentals, supporting confidence for both buyers and sellers.

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.

