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AUGUST 2026

DAVIDSON COUNTY LUXURY MARKET REPORT

EXECUTIVE SUMMARY

August marked the first meaningful slowdown of 2026 in Davidson County's \$750K–\$1.5M luxury segment.

Closings fell to 75, down 28% from July's 104, while active inventory rose to 402 and months of supply increased from 3.8 to 5.4. The market moved from the tighter conditions of midsummer into a more balanced environment.

Pricing, however, held. The median sale price rose to \$965,000, the average sale price reached \$997,191, and the 97.1% sale-to-list ratio shows that correctly positioned homes continued to transact near asking price. This is a volume story, not a value story.

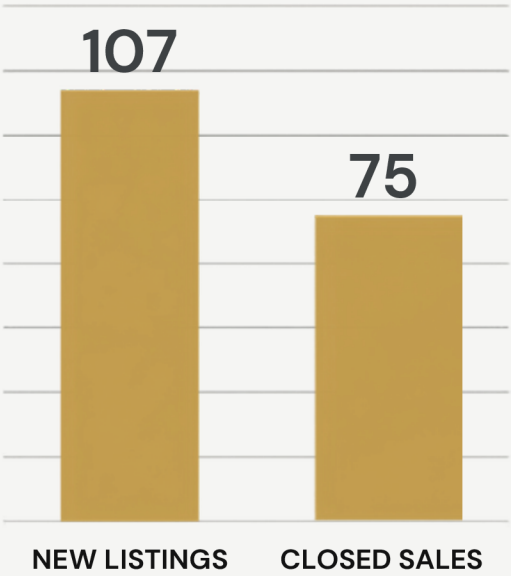


KEY METRICS

August 2026 Luxury Market Snapshot

ACTIVE LISTINGS	CLOSED SALES	MEDIAN SALE PRICE	SALE-TO-LIST
402	75	\$965K	97.10%
MARKET SUPPLY			
5.4 MONTHS OF SUPPLY			

\$750K–\$1.5M LUXURY MARKET SEGMENT



MARKET ACTIVITY

August brought 107 new listings and 75 closed sales to Davidson County's \$750K–\$1.5M luxury segment.

Same-month absorption weakened significantly: only 9 of 107 new listings went under contract or closed within August, and new listings fell 25% from July's 143 as sellers pulled back at roughly the same rate as buyers.

Active inventory rose to 402, moving the market from seller-favorable into balanced territory.

PRICING TRENDS

Pricing did not break despite the slowdown in transaction volume.

The median sale price rose to \$965,000, while the average closed price was \$997,191. Properties averaged \$370 per sq ft, with a median of \$330 per sq ft.

The 97.1% sale-to-list ratio shows that well-positioned homes continued to transact near asking, though the share closing at or above list eased from 47% to 39%.



MARKET TAKEAWAY

Lower volume. Stable pricing. More balanced conditions.

August's shift was driven by slower absorption, not broad-based price deterioration.

PRICING ANALYSIS - AUGUST 2026

\$997.2K

Average Closed Price

\$370

Average \$ / Sq Ft

PRICING TRENDS

August 2026 Luxury Segment

August pricing remained stable even as transaction volume declined across Davidson County's \$750K–\$1.5M luxury segment.

The average closed price was \$997,191, compared with \$994,575 in July, while the median sale price increased from \$945,000 to \$965,000.

Average price per square foot held at \$370, while the median declined from \$350 to \$330 — buyers kept buying more house for the same money, with the median home sold rising to 2,826 square feet.

The 97.1% sale-to-list ratio and a sub-1.5% gap between average list and sold price per square foot show that sellers were still pricing accurately in aggregate.

MARKET TAKEAWAY

Pricing held. Buyer velocity softened. Positioning matters more.

The August data points to a volume slowdown rather than a broad decline in value — the issue was fewer buyers showing up, not mispricing.

MARKET POSITIONING + WHAT IT MEANS



INVENTORY

402

Active Listings

5.4

Months of Supply

Inventory moved into a balanced range as active listings rose to 402 and months of supply climbed from 3.8 to 5.4.



BUYER DEMAND

75

Closed Sales

39%

Closed At or Above List

Buyer activity slowed, but qualified demand remained present for correctly positioned homes.



PRICING

97.1%

Sale-to-List Ratio

\$965K

Median Sale Price

Pricing held even as volume declined — the median sale price rose while homes still sold near asking.

WHAT THIS MEANS FOR BUYERS & SELLERS



FOR BUYERS:

More inventory means more choice, especially above \$1.35M, where supply has expanded most.



FOR SELLERS:

Launch at the right number from day one — buyers are more selective and absorption has slowed.



MARKET POSITIONING

MORE BALANCED INVENTORY. STABLE PRICING. SLOWER BUYER VELOCITY.

ACTIVE HIGHLIGHT

300 Rolling Mill Rd — Brandywine Farms **List Price: \$1,299,900**

- Featured active listing for the August 2026 market report
- 7,100 sq ft · 5 bedrooms · 4 full baths · built 1966
- \$183 per sq ft — against a \$349 median for active inventory
- Listed August 25, 2026
- Nearly two and a half times the size of the median active listing (2,894 sq ft)



The strongest value-per-foot story in the segment — a direct test of whether buyers will keep trading toward more space at stable total dollars.



CLOSED HIGHLIGHT

6001 Sedberry Rd — Harding Park **Sold Price: \$1,360,000**

- Featured closed sale for the August 2026 market report
- Listed at \$1,299,000 · closed August 28
- 2,200 sq ft · 3 bedrooms · 2.5 baths · built 1956
- \$618 per sq ft — 87% above the segment median
- 104.7% of asking — under contract in 5 days

The widest over-list margin of any August closing in the band — a fully renovated single-level home near Belle Meade drew its buyer within five days and closed \$61,000 over asking.

FEATURED LISTING



EASTWOOD • EAST NASHVILLE

909 N 14th St

\$875,000

4 Bed | 3 Bath | 2,702 Sq. Ft.

PROPERTY HIGHLIGHTS

- Built 1925, classic East Nashville character
- Level, private 0.41-acre lot
- Primary bedroom on the main floor
- Partially finished basement
- Living-room fireplace
- Fenced back yard and deck
- No HOA

View Full Property Details



Scan to view the complete listing,
additional photos, and schedule
your private showing.

A 1925 Eastwood home on a deep 0.41-acre lot, minutes from downtown and East Nashville's dining, shopping and parks. Four bedrooms and 2,702 square feet at \$324 per square foot, below the segment's \$349 median for active listings.

MARKET OUTLOOK



INVENTORY

More balanced, with wider choice above \$1.35M

Active inventory reached 402 and months of supply rose from 3.8 to 5.4. The \$1.35M–\$1.5M band now carries 10.4 months of supply — 52 active listings against 5 closings — while \$750K–\$900K sits at 6.2 months.



OUTLOOK AHEAD

New listings fell 25% from July, which should help supply stabilize rather than climb through the fall.



PRICING

Stable, but more selective by band

August's 97.1% sale-to-list ratio and rising \$965,000 median show sellers who price accurately still capture full value. Homes launched above the market are competing with a growing pool of listings that already tried that.



OUTLOOK AHEAD

Pricing is expected to hold into Q4, with greater variation by price band and positioning than by month.



BUYER DEMAND

Slower, but still active below \$1.2M

Closings fell 28% to 75, yet 39% still closed at or above list. The \$900K–\$1.05M band led the segment at 3.1 months of supply, a 54-day median and 98.5% of list.



OUTLOOK AHEAD

Buyer activity is likely to stay selective, particularly above \$1.35M, as the fall market gets underway.



MARKET OUTLOOK

Balanced, with wider gaps by price point.

Volume is expected to stay soft through Q4 while pricing holds. The strongest liquidity remains below \$1.2M; above \$1.35M, sellers should launch at the number and buyers have the best negotiating environment of this cycle.



WHAT TO WATCH

\$1.35M–\$1.5M

10.4 months of supply — expect price cuts.

\$750K–\$900K

Softened to 6.2 months — watch in September.

NEW LISTINGS

Down 25% from July — supply is self-correcting.

BUYER VELOCITY

75 August closings, 52 under contract.

WHY LIST WITH Alexander Brandau IV

Davidson County's luxury market is increasingly selective, making pricing, positioning, and presentation more important than ever. Alexander brings a disciplined, data-informed approach to helping sellers understand their property's position and attract qualified buyers.



From pricing strategy to marketing and negotiation, Alexander and his team focus on positioning each property to compete effectively in today's luxury market.

LUXURY MARKET STRATEGY CONSULTATION

Scan the QR code to request a confidential review of your property's valuation, positioning, and selling strategy in the current market.

