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DAVIDSON COUNTY

ULTRA-LUXURY MARKET REPORT

AUGUST 2026

EXECUTIVE SUMMARY

August closed the summer with Davidson County's luxury market holding firm at the top even as buyers gained the widest selection they have had all season.

A total of 53 new luxury listings entered the market while 46 successful closings generated \$116.2 million in sales volume. The average closed price reached \$2.53 million, the highest monthly figure of the quarter, with sellers achieving an average of 96.9% of list price and 20 of the 46 closings landing at or above full asking.

Active inventory expanded to 426 homes representing roughly 6.6 months of supply, up from 4.4 at midsummer, giving buyers meaningful leverage heading into fall without loosening pricing at the top of the band.

Transaction weight moved upmarket. The \$1.5M–\$2.5M range remained the county's core with 27 closings, while 16 homes closed above \$2.5 million, a heavier high-end concentration than July produced.

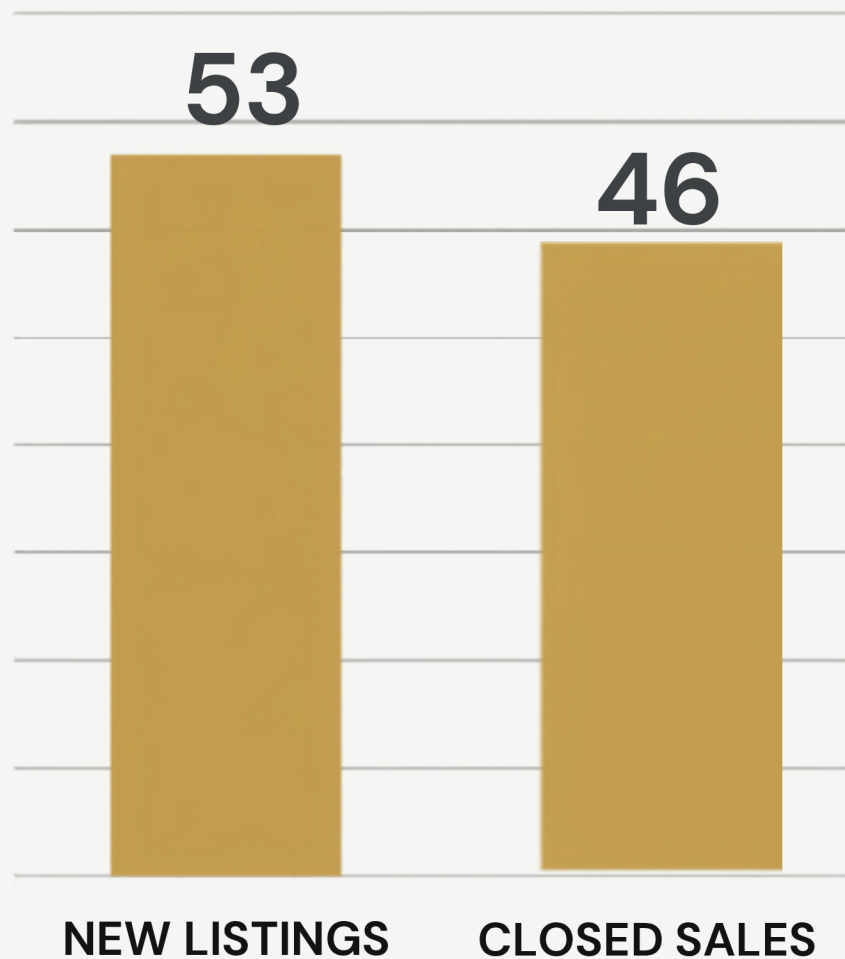


KEY METRICS

AUGUST 2026 ULTRA-LUXURY MARKET SNAPSHOT

NEW LISTINGS	CLOSED SALES	AVG CLOSED PRICE	AVG \$/SQFT
53	46	\$2.53M	\$516
TRANSACTIONAL CORE			
\$1.5M–\$2.5M			

MARKET PULSE - AUGUST 2026



MARKET ACTIVITY

August 2026 Ultra-Luxury Segment

August held firm with 53 new luxury listings entering the Davidson County market while 46 homes successfully closed, keeping new supply and buyer absorption in the near-equilibrium that has defined this market all year.

New listings moderated from July while buyer activity held, generating \$116.2 million in closed sales. Sellers achieved an average of 96.9% of list price, and 20 of the 46 closings landed at or above full asking.

The \$1.5M–\$2.5M range remained Davidson County's transaction core with 27 closings, while 16 homes closed above \$2.5 million, a heavier concentration at the top of the band than July delivered.

Overall, August reflects a luxury market where deeper inventory, disciplined pricing, and qualified buyer demand continued supporting consistent transaction volume as the third quarter moved toward its close.

PRICING ANALYSIS - AUGUST 2026

\$2.53M

Average Closed Price

\$554

Average \$ / Sq Ft

PRICING TRENDS

August 2026 Ultra-Luxury Segment

August pricing did what rising inventory is not supposed to allow. Selection widened and prices firmed at the same time.

The average closed sale price reached \$2.53 million, the highest monthly figure of the quarter, while buyers paid an average of \$554 per square foot across Davidson County's \$1.5M–\$5M luxury segment.

Sellers achieved an average of 96.9% of list price, and 20 of the 46 closings landed at or above full asking, with 5 selling above ask outright.

The clearest signal sits in the gap between ask and achieved. Active inventory carries a median list price of \$531 per square foot; August closings achieved a median of \$528. A spread of well under one percent means sellers are pricing to what the market pays rather than testing it.

Overall, August reinforced that pricing success is being driven by accuracy rather than appreciation. Correctly positioned homes drew full value, while ambition above \$3 million continued to be met with long market times.

MARKET VELOCITY - AUGUST 2026

46

Successful Closings

\$1.5M–\$2.5M

Transactional Core

MARKET VELOCITY

August 2026 Ultra-Luxury Segment

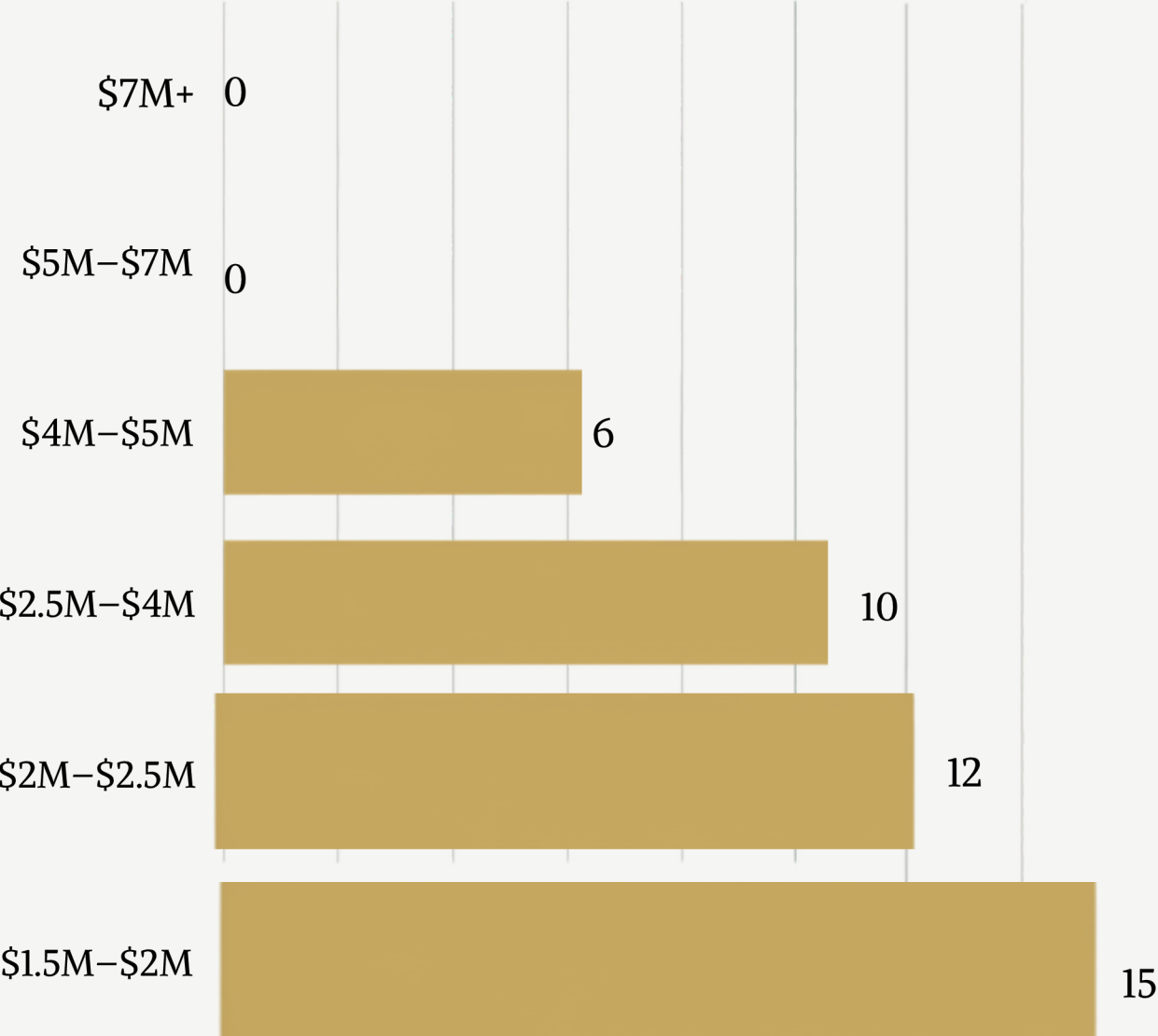
August produced 46 successful closings, a pace consistent with the summer rhythm of this market and with the 53 new listings that entered alongside them.

Buyer demand stayed competitive rather than merely present. Sellers achieved an average of 96.9% of list price, 20 of the 46 closings landed at or above full asking, and 5 sold above ask outright.

Liquidity still centers on the \$1.5M–\$2.5M range, where 27 homes closed. That is a smaller share of the month than July delivered, not because the core weakened but because 16 homes closed above \$2.5 million and pulled weight toward the top of the band.

Speed continued to reward accuracy over ambition. Median days on market reached 99, and August cleared several long-aged listings, including homes that had sat 268 and 338 days before finding their price.

TRANSACTION BREAKDOWN - AUGUST 2026



PRICE DISTRIBUTION

August 2026 Ultra-Luxury Segment

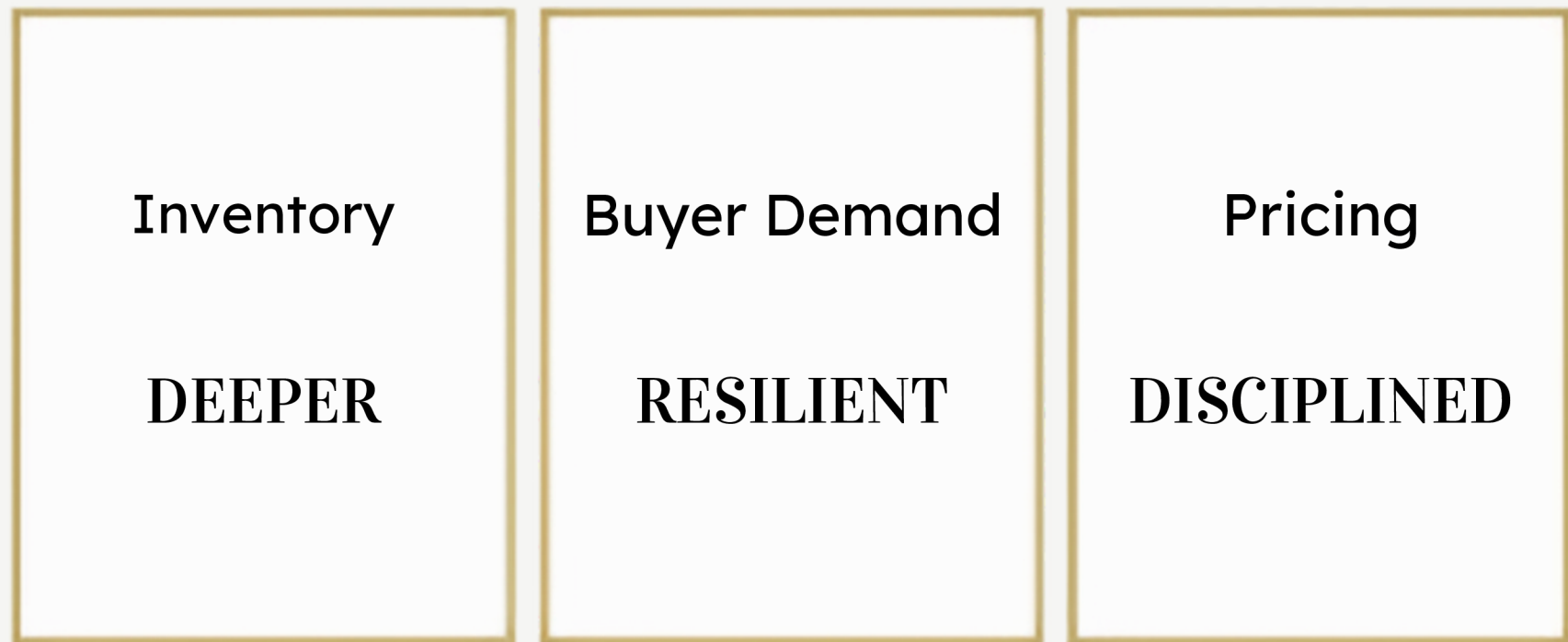
August's distribution moved upmarket without hollowing out the core. The \$1.5M-\$2M segment again led with 15 closings and \$2M-\$2.5M added 12, keeping 27 of the month's sales inside Davidson County's transactional core.

Above that line, 10 homes closed between \$2.5M and \$4M and a further 6 between \$4M and \$5M. Sixteen closings above \$2.5 million is a materially heavier top than July produced, and it is what lifted the month's average sale price to \$2.53 million.

Because the luxury band is defined by a \$1.5M to \$5M list price, no closings fall into the \$5M-\$7M or \$7M+ rows this month.

The distribution above reflects the 43 August closings carrying a recorded price band.

MARKET POSITIONING - AUGUST 2026



MARKET POSITIONING

August 2026 Ultra-Luxury Segment

August's luxury market gave buyers more to choose from than at any point this summer without surrendering price.

Active inventory reached 426 homes worth \$1.12 billion, lifting supply to roughly 6.6 months from 4.4 at midsummer. On its own that reads as a shift toward buyers.

What the closings say is different. Sellers achieved an average of 96.9% of list price, 20 of the 46 closings landed at or above full asking, and the median achieved price per square foot came within one percent of the median asking price across active inventory.

Demand also broadened upward. Sixteen homes closed above \$2.5 million, against a core of 27 closings between \$1.5M and \$2.5M, lifting the month's average sale price to its highest mark of the quarter.

The position, then, is a market with genuine selection and no discount attached to it. Buyers have room to choose; sellers who price to the market are still collecting full value.

WHAT THIS MEANS FOR BUYERS & SELLERS - AUGUST 2026

FOR BUYERS

More Selection

426 active homes and 6.6 months of supply, the widest choice of the summer, with the most room above \$3 million.

FOR SELLERS

Full Value

20 of 46 homes closed at or above asking, with sellers averaging 96.9% of list price.

WHAT THIS MEANS FOR BUYERS & SELLERS

August 2026 Ultra-Luxury Segment

August created a rare combination: real choice for buyers and full value for sellers, at the same time.

For buyers, selection is the best it has been all summer. 426 homes are active and supply sits near 6.6 months, with the deepest choice above \$3 million where 121 listings compete for a thinner pool. Below \$2.5 million, come prepared to move; that core still clears at or above asking.

For sellers, the month rewarded accuracy and punished ambition. Homes priced to the market drew full value, with 20 of 46 closing at or above ask. Homes priced to test it waited, and August's clearances at 268 and 338 days show what testing costs.

The practical takeaway is the same on both sides of the table. Price is no longer a negotiating position in this market, it is a filter. Set it to what the data supports and the market responds quickly.

NOTABLE TRANSACTIONS



**Notable
Active
Listing**

4600 Shys Hill Rd — Seven Hills

\$4,997,000

5 Beds | 5 Full, 2 Half | 7,108 Sq. Ft.



**Highest
Closed
Sale**

1030 Chancery Ln S — Belle Meade

\$5,000,000

4 Beds | 3 Full, 1 Half | 5,679 Sq. Ft.

Highest recorded luxury sale during August 2026. Sold at full asking price in 28 days.

FEATURED LISTING



OAK HILL • NASHVILLE

806 Willowdale Ct

\$2,300,000

4 Bed | 3.5 Bath | 3,980 Sq. Ft.

PROPERTY HIGHLIGHTS

- 1.97-acre private lot
- In-ground pool
- Professionally measured 3,980 sq ft
- Two-car garage
- No HOA
- Built 1972 in Russellwood Heights
- Minutes to Green Hills and Brentwood

View Full Property Details



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

A rare 1.97-acre setting in Oak Hill, one of Davidson County's most established luxury pockets. Nearly 4,000 square feet, an in-ground pool and no HOA, positioned inside the \$1.5M to \$2.5M core that carried the majority of August's closings.

MARKET OUTLOOK - AUGUST 2026

INVENTORY	PRICING	BUYER DEMAND
		
Deeper	Disciplined	Resilient

MARKET OUTLOOK

August 2026 Ultra-Luxury Segment

August closed the summer with a firmer top and a deeper shelf of inventory, leaving Davidson County's luxury market well supplied without softening on price.

The near-term pipeline is visible. 28 homes sit under contract at an average list price near \$2.50 million, pointing to a September of roughly 45 to 60 closings and \$115 to \$150 million in volume, with sale-to-list holding near 97%.

Three things will decide the quarter's close: whether fall buyers re-engage after the late-summer lull, whether the 121 active listings above \$3 million begin to clear, and whether new listings keep arriving near the \$515 to \$530 per square foot that has kept absorption healthy.

Into the fourth quarter, expect a seasonally normal cooling in transaction count offset by continued pricing firmness. Price to the market on day one and Nashville's best addresses still command every dollar.

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.

