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DAVIDSON COUNTY

ULTRA-LUXURY MARKET REPORT

SEPTEMBER 2026

EXECUTIVE SUMMARY

September closed the third quarter with Davidson County's luxury market tilting toward buyers as new supply reached its heaviest month of the quarter while prices held firm.

A total of 79 new luxury listings entered the market while 36 closings recorded so far generated \$85.1 million in sales volume. The average closed price was \$2.36 million, with sellers achieving an average of 97.0% of list price and 13 of the 36 closings landing at or above full asking.

Active inventory expanded to 468 homes representing roughly 7.4 months of supply, giving buyers the widest selection and most negotiating room of the year without softening pricing at the top of the band.

Transaction activity stayed anchored in the core. The \$1.5M–\$2.5M range carried the county with 22 closings, while 12 homes closed above \$2.5 million.

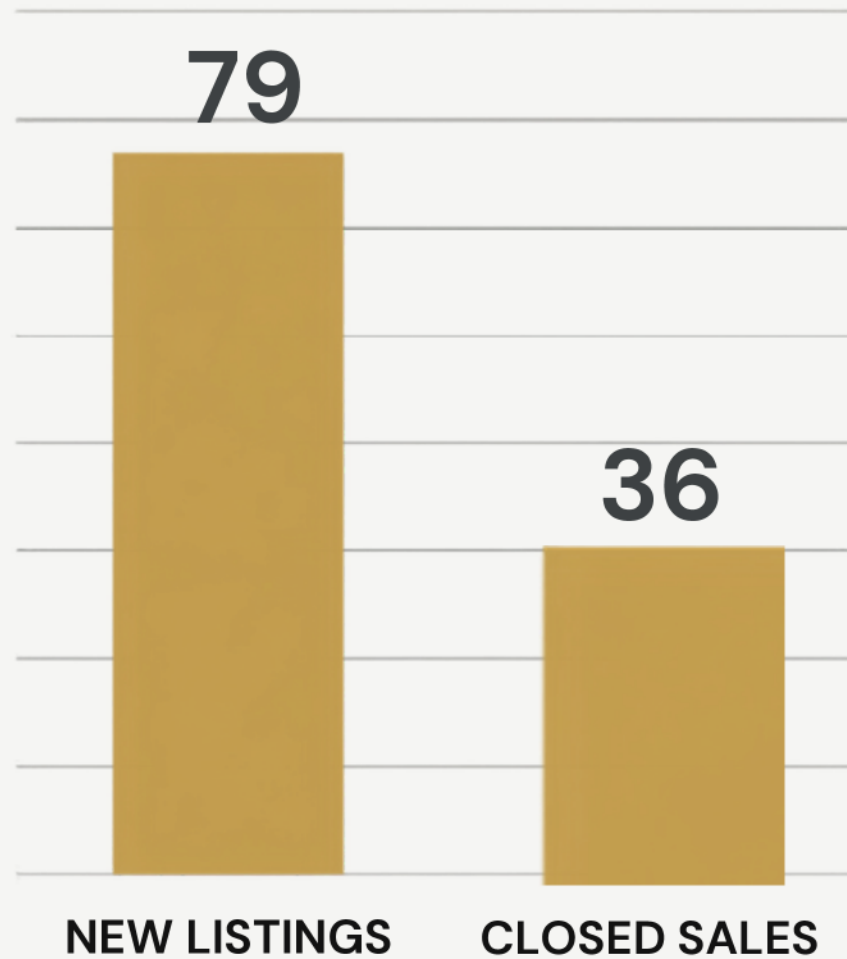


KEY METRICS

SEPTEMBER 2026 ULTRA-LUXURY MARKET SNAPSHOT

NEW LISTINGS	CLOSED SALES	AVG CLOSED PRICE	AVG \$/SQFT
79	36	\$2.36M	\$494
TRANSACTIONAL CORE			
\$1.5M–\$2.5M			

MARKET PULSE - SEPTEMBER 2026



MARKET ACTIVITY

September 2026 Ultra-Luxury Segment

September closed the third quarter with 79 new luxury listings entering the Davidson County market while 36 homes have recorded as closed so far, the heaviest month of new supply the quarter produced.

New listings surged past July and August while buyer activity cooled seasonally, generating \$85.1 million in closed sales. Sellers achieved an average of 97.0% of list price, and 13 of the 36 closings landed at or above full asking.

The \$1.5M–\$2.5M range remained Davidson County's transaction core with 22 closings, while 12 homes closed above \$2.5 million.

Overall, September reflects a luxury market where a surge in new inventory handed buyers the widest selection of the year while disciplined pricing kept values firm as the third quarter closed.

PRICING ANALYSIS - SEPTEMBER 2026

\$2.36M

Average Closed Price

\$494

Average \$ / Sq Ft

PRICING TRENDS

September 2026 Ultra-Luxury Segment

September told a different story from August, but the discipline underneath was the same. Supply surged while prices held firm.

The average closed sale price was \$2.36 million, with buyers paying an average of \$494 per square foot across Davidson County's \$1.5M–\$5M luxury segment.

Sellers achieved an average of 97.0% of list price, and 13 of the 36 closings landed at or above full asking, with 4 selling above ask outright.

The clearest nuance sits in price per square foot. September closings achieved an average of \$494, while the median dipped to \$442, pulled down by a heavier mix of very large homes above 6,000 square feet that always trade lower per foot rather than by any softening in value.

Overall, September 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 - SEPTEMBER 2026

36

Successful Closings

\$1.5M–\$2.5M

Transactional Core

MARKET VELOCITY

September 2026 Ultra-Luxury Segment

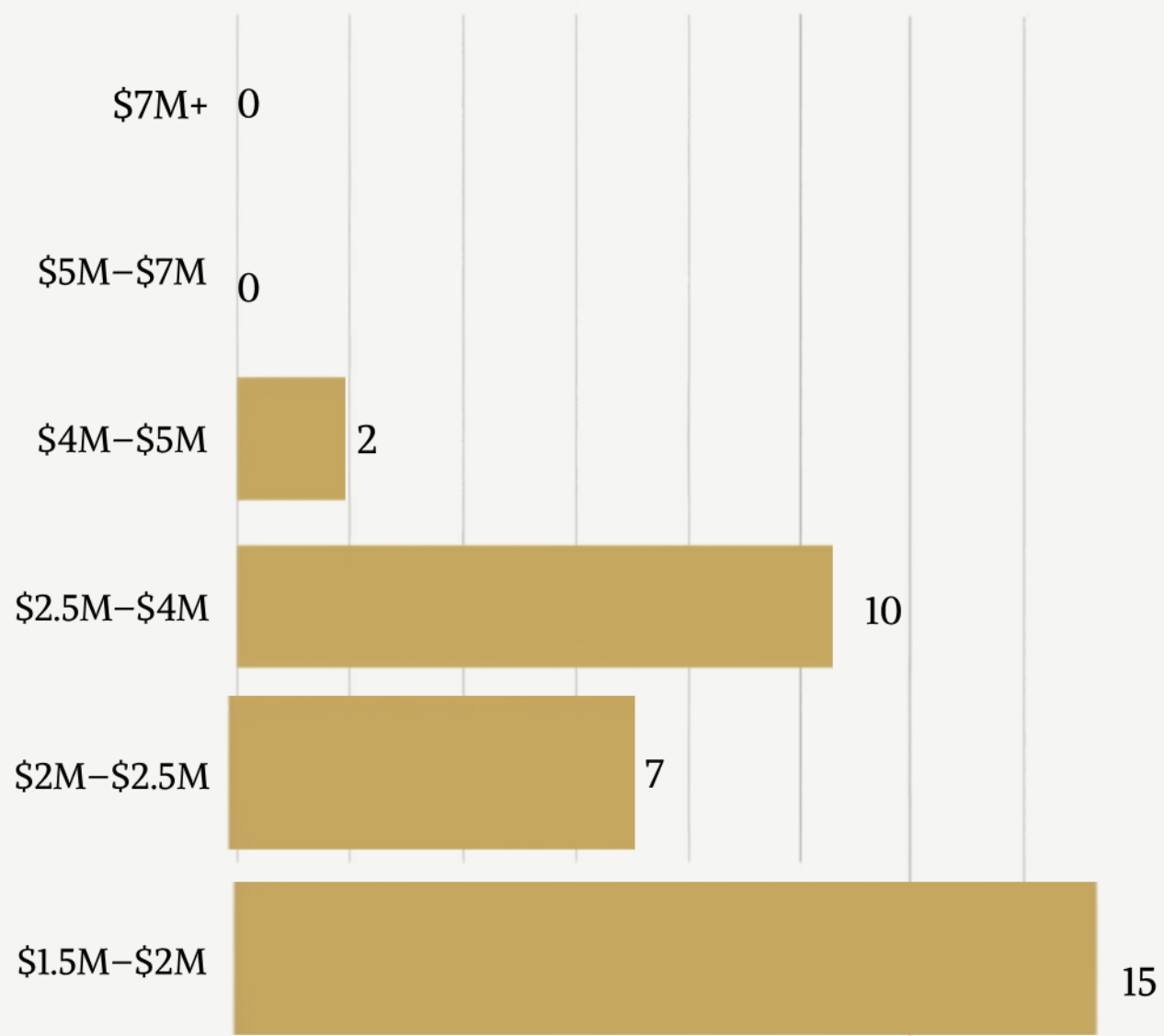
September produced 36 closings recorded so far, a seasonal step down from the summer pace, set against the 79 new listings that entered alongside them, the heaviest month of new supply the quarter produced.

Buyer demand stayed selective rather than absent. Sellers achieved an average of 97.0% of list price, 13 of the 36 closings landed at or above full asking, and 4 sold above ask outright.

Liquidity still centers on the \$1.5M–\$2.5M range, where 22 homes closed. Twelve homes closed above \$2.5 million, keeping the core as the month's anchor while the top traded more patiently.

Speed continued to reward accuracy over ambition. Median days on market came in at 76, the quarter's fastest, even as September cleared several long-aged listings, including homes that had sat 459 and 679 days before finding their price.

TRANSACTION BREAKDOWN - SEPTEMBER 2026



PRICE DISTRIBUTION

September 2026 Ultra-Luxury Segment

September's distribution stayed anchored in the core even as the top of the band thinned. The \$1.5M-\$2M segment again led with 15 closings and \$2M-\$2.5M added 7, keeping 22 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 2 between \$4M and \$5M. Twelve closings above \$2.5 million is a lighter top than August produced, which is why the month's average sale price settled at \$2.36 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 34 September closings carrying a recorded price band.

MARKET POSITIONING - SEPTEMBER 2026



MARKET POSITIONING

September 2026 Ultra-Luxury Segment

September's luxury market gave buyers more to choose from than at any point this year, and for the first time in 2026 the balance of leverage tipped their way.

Active inventory reached 468 homes worth \$1.22 billion, lifting supply to roughly 7.4 months as 79 new listings arrived, the heaviest month of the quarter. On its own that reads as a clear shift toward buyers.

What the closings say is that value held. Sellers achieved an average of 97.0% of list price, 13 of the 36 closings recorded so far landed at or above full asking, and buyers paid an average of \$494 per square foot.

Demand concentrated in the core. Twenty-two homes closed between \$1.5M and \$2.5M, against 12 above \$2.5 million, keeping the month's average sale price at \$2.36 million.

The position, then, is a market with genuine selection and firm pricing. Buyers have real room to choose and negotiate; sellers who price to the market are still collecting full value.

WHAT THIS MEANS FOR BUYERS & SELLERS - SEPTEMBER 2026

FOR BUYERS

Real Leverage

468 active homes and 7.4 months of supply, the widest choice of the year, with the most room above \$3 million.

FOR SELLERS

Full Value

13 of 36 homes closed at or above asking, with sellers averaging 97.0% of list price.

WHAT THIS MEANS FOR BUYERS & SELLERS

September 2026 Ultra-Luxury Segment

September created a different combination from August: real leverage for buyers and firm value for sellers who price correctly.

For buyers, selection is the best it has been all year. 468 homes are active and supply sits near 7.4 months, with the deepest choice above \$3 million where 131 listings compete for a thinner pool. Below \$2.5 million, the core still clears quickly; come prepared to move.

For sellers, the month rewarded accuracy and punished ambition. Homes priced to the market drew full value, with 13 of 36 closing at or above ask. Homes priced to test it waited, and September's clearances at 459 and 679 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**

1915 Blair Blvd — Belmont Hillsboro
\$4,495,000
5 Beds | 4 Full, 3 Half | 6,388 Sq. Ft.



**Notable
Closed
Sale**

1015 Halcyon Ave — 12 South
\$3,900,000
4 Beds | 4 Full, 1 Half | 4,088 Sq. Ft.

Notable luxury sale during September 2026. Sold at full asking price at \$954 per square foot, the highest of any September closing.

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 September's closings.

MARKET OUTLOOK - SEPTEMBER 2026

INVENTORY	PRICING	BUYER DEMAND
		
Deeper	Firm	Selective

MARKET OUTLOOK

September 2026 Ultra-Luxury Segment

September closed the third quarter with buyers holding the most leverage they have had all year, leaving Davidson County's luxury market well supplied and firmly priced heading into the fall.

The near-term pipeline is visible. 41 homes sit under contract at an average list price near \$2.47 million, pointing to a fourth quarter of roughly 130 to 155 closings and \$320 to \$385 million in volume, with sale-to-list easing toward 96 to 97%.

Three things will decide the quarter: whether the fall listing wave keeps outpacing absorption, whether the 131 active listings above \$3 million begin to clear, and whether new listings calibrate toward the \$500 to \$527 per square foot the market is actually paying.

Into the fourth quarter, expect a seasonally normal cooling in transaction count and a modest shift of leverage toward buyers, while pricing holds firm. 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.

