Prepared by Alexander Brandau IV
Aperture Global Real Estate

DAVIDSON COUNTY
ULTRA-LUXURY MARKET REPORT
OCTOBER 2026

EXECUTIVE SUMMARY

October opened the fourth quarter with Davidson County's luxury market holding steady on sales while buyers gained the most negotiating room of the year.

A total of 58 new luxury listings entered the market while 38 closings recorded so far generated $86.5 million in sales volume. The average closed price was $2.28 million, with sellers achieving an average of 95.2% of list price and 8 of the 38 closings landing at or above full asking.

Active inventory thinned to 278 homes as new listings slowed, representing roughly 7.3 months of supply, and 36 homes went under contract heading into November.

Transaction activity stayed anchored in the core. Homes under $2.5 million carried the county with 25 closings, while 13 homes closed above $2.5 million.

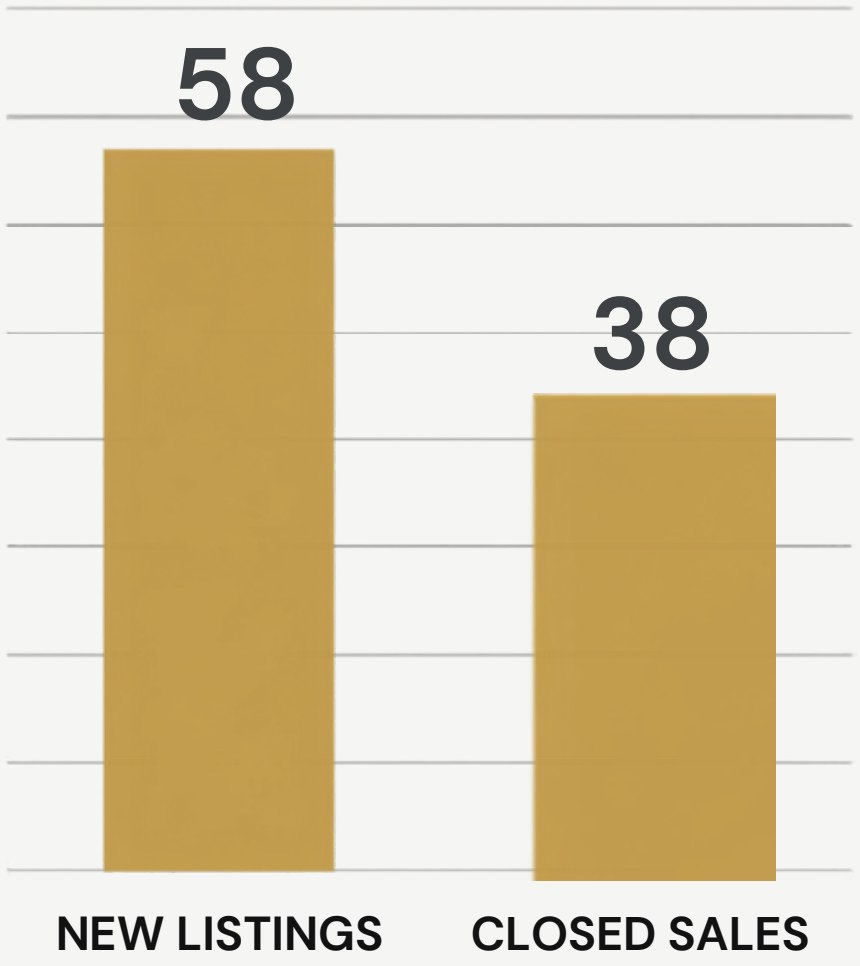
KEY METRICS

OCTOBER 2026 ULTRA-LUXURY MARKET SNAPSHOT

NEW LISTINGS	CLOSED SALES	AVG CLOSED PRICE	AVG $/SQFT
58	38	$2.28M	$506

TRANSACTIONAL CORE
$1.5M–$2.5M

MARKET PULSE - OCTOBER 2026



MARKET ACTIVITY

October 2026 Ultra-Luxury Segment

October opened the fourth quarter with 58 new luxury listings entering the Davidson County market while 38 homes have recorded as closed so far, level with September.

New listings eased after September's fall surge while buyer activity held steady, generating $86.5 million in closed sales. Sellers achieved an average of 95.2% of list price, and 8 of the 38 closings landed at or above full asking.

Homes under $2.5 million remained Davidson County's transaction core with 25 closings, while 13 homes closed above $2.5 million.

Overall, October reflects a luxury market where demand held its floor while buyers gained negotiating room, with 36 homes under contract heading into November.

PRICING ANALYSIS - OCTOBER 2026

$2.28M
Average Closed Price

$506
Average $ / Sq Ft

PRICING TRENDS

October 2026 Ultra-Luxury Segment

October held the line on value while giving ground on negotiation. Buyers paid close to what the market has paid all year, but fewer sellers got their full price.

The average closed sale price was $2.28 million, with buyers paying an average of $506 per square foot across Davidson County's $1.5M–$5M luxury segment.

Sellers achieved an average of 95.2% of list price, down from 97.2% across the third quarter, and 8 of the 38 closings landed at or above full asking, with 2 selling above ask outright.

The clearest nuance sits in the gap between asking and achieved. Active listings ask an average of $553 per square foot, about 9% above the $506 buyers paid. The median sold price per square foot was $474.

Overall, October reinforced that pricing success is being driven by accuracy rather than appreciation. Both sales above $4 million closed at or above asking, while homes priced ahead of the market continued to wait.

MARKET VELOCITY - OCTOBER 2026

38	$1.5M–$2.5M
Successful Closings	Transactional Core

MARKET VELOCITY

October 2026 Ultra-Luxury Segment

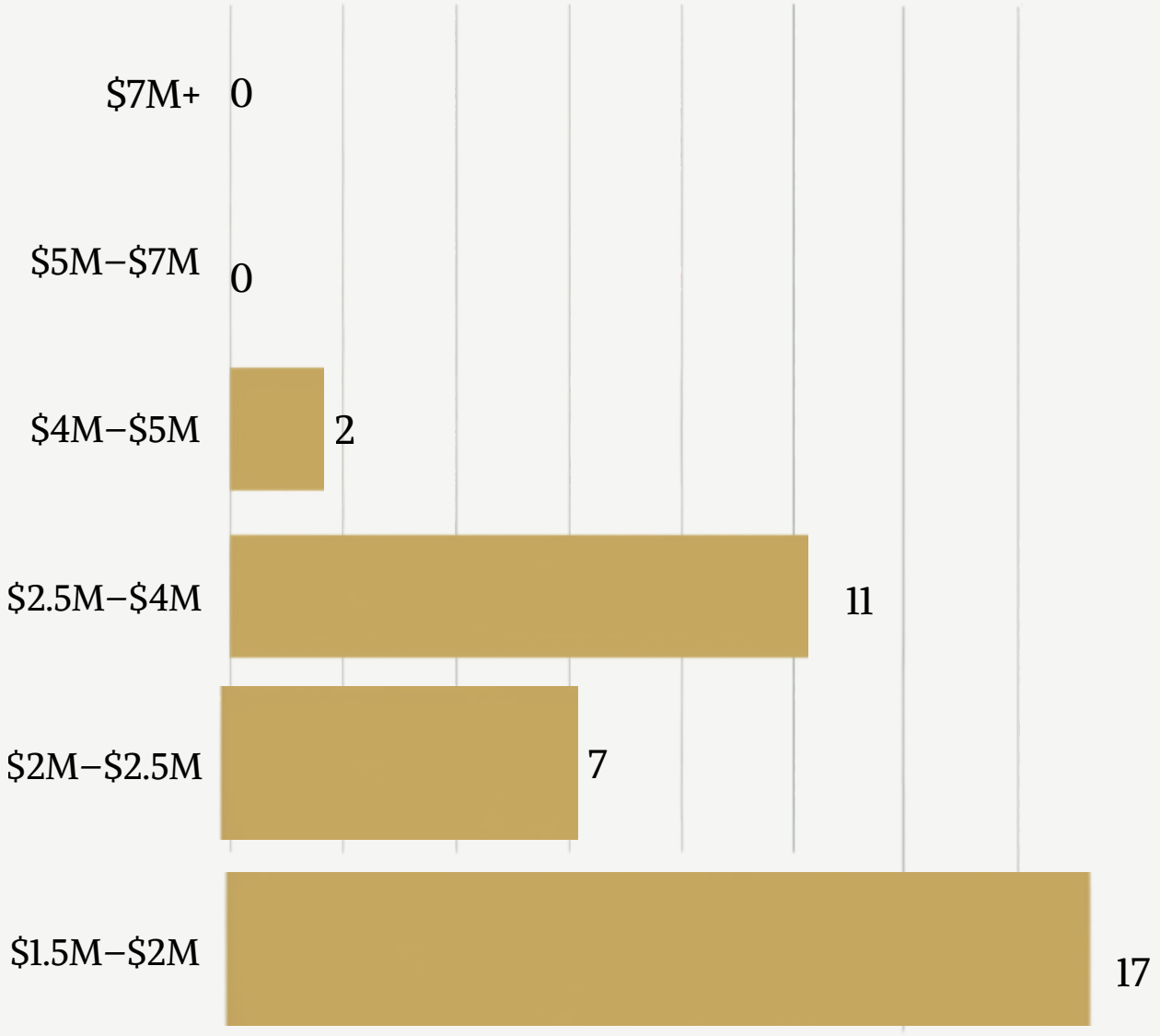
October produced 38 closings recorded so far, level with September, set against 58 new listings, down from 79 the month before.

Buyer demand held steady but asked for more. Sellers achieved an average of 95.2% of list price, 8 of the 38 closings landed at or above full asking, and 2 sold above ask outright.

Liquidity still centers below $2.5 million, where 25 homes closed. Thirteen homes closed above $2.5 million. Supply stands at about 7.3 months overall: balanced in the core and buyer-leaning above $3 million.

Speed slowed. The median home took 117 days from list to close, up from 86 across the third quarter. The right price still moved quickly: October's highest sale, 508 Davidson Road, sold at full asking after 32 days on market.

TRANSACTION BREAKDOWN - OCTOBER 2026



PRICE DISTRIBUTION

October 2026 Ultra-Luxury Segment

October's distribution stayed anchored in the core. The $1.5M–$2M segment led with 17 closings and $2M–$2.5M added 7, keeping 24 of the month's sales inside Davidson County's transactional core.

Above that line, 11 homes closed between $2.5M and $4M and a further 2 between $4M and $5M. Only 6 closings came above $3 million, where 71 active listings compete, which is why the top favors buyers.

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.

One home listed at $1,525,000 sold for $1,350,000 and falls below the first band, so the chart shows 37 of the 38 closings.

MARKET POSITIONING - OCTOBER 2026

Closed Sales	Buyer Demand	Pricing
STEADY	SELECTIVE	NEGOTIABLE

MARKET POSITIONING

October 2026 Ultra-Luxury Segment

October's luxury market held its sales pace while the terms moved toward buyers.

Closings held at 38, level with September, as 58 new listings arrived and active inventory thinned to 278 homes, about 7.3 months of supply. With 36 homes under contract at month end, demand found its floor.

What changed was the negotiation. Sellers achieved an average of 95.2% of list price, the lowest ratio since at least April, and 8 of the 38 closings landed at or above full asking. Buyers paid an average of $506 per square foot.

Demand was selective. Buyers paid for homes priced near $500 per square foot and passed on the rest, above all over $3 million, where 71 active listings compete.

The position, then, is a steady market with negotiable pricing and selective buyers. Sellers who price to recent closed sales are still selling; those who price to the listings around them are waiting.

WHAT THIS MEANS FOR BUYERS & SELLERS - OCTOBER 2026

FOR BUYERS

Most Room of the Year

Sellers took 95.2% of asking on average, with about 12 months of supply above $3 million.

FOR SELLERS

Price to the Market

Buyers paid $506 per square foot while active listings ask $553. Price to closed sales.

WHAT THIS MEANS FOR BUYERS & SELLERS

October 2026 Ultra-Luxury Segment

October kept the sales pace and shifted the terms: more room for buyers, and full value only for sellers who price correctly.

For buyers, this is the most negotiating room of the year. Sellers took 95.2% of asking on average, and above $3 million there are about 12 months of supply. Listings that have sat the longest usually carry the most room. Below $2.5 million the core still moves; come prepared.

For sellers, the gap is the lesson. Buyers paid $506 per square foot while active listings ask $553. Price to October's closed sales, not the signs on your street. The $2.5M to $3M band is the tightest in the county at 4.7 months of supply.

The practical takeaway is the same on both sides of the table. Price is a filter, not a negotiating position. Set it to what the data supports and the market responds.

NOTABLE TRANSACTIONS



Notable Active Listing

4317 Wallace Ln — Sneed Estates

$4,890,000

6 Beds | 6 Full, 2 Half | 6,503 Square Feet



Notable Closed Sale

508 Davidson Road — Brook Meade

$4,175,000

6 Beds | 6 Full, 2 Half | 6,786 Square Feet

October's highest sale closed at full asking price after 32 days on market. Alexander Brandau IV represented the buyer. Listings courtesy of Kristie Gogo, Compass RE (4317 Wallace Ln) and Jessica Averbuch, Zeitlin Sotheby's International Realty (508 Davidson Road).

FEATURED LISTING



WEST MEADE HILLS • NASHVILLE

805 Cammack Ct

$1,725,000

5 Bed | 3 Bath | 3,804 Square Feet

PROPERTY HIGHLIGHTS

- 1.15-acre private lot
- Quiet cul-de-sac setting
- 5 bedrooms, 3 baths
- 3,804 square feet
- Built 1963, renovated in 2022
- Updated kitchen
- Mature trees in West Meade Hills

View Full Property Details

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

Mature trees, an established street and a kitchen that feels brand new, on more than an acre in West Meade Hills. Renovated top to bottom in 2022 and priced inside the $1.5M to $2.5M core that carried most of October's closings.

MARKET OUTLOOK - OCTOBER 2026

CLOSED SALES	PRICING	BUYER DEMAND
Steady	Negotiable	Selective

MARKET OUTLOOK

October 2026 Ultra-Luxury Segment

October opened the fourth quarter with sales holding steady and buyers holding the most negotiating room of the year, a balance likely to carry through the holidays.

The near-term pipeline is visible. 36 homes sit under contract at an average list price near $2.66 million, pointing to roughly 35 to 45 closings in November and 105 to 125 for the quarter, with sale-to-list holding near 95 to 96%.

Three things will decide the rest of the quarter: whether new listings stay slow through the holidays, whether the 71 active listings above $3 million begin to clear, and whether sellers price toward the roughly $500 per square foot the market is actually paying.

Into year end, expect steady closings, slower new supply and continued buyer leverage. The $1.5M to $2.5M core remains the engine, $2.5M to $3M is the tightest band, and above $3 million buyers have the most room heading into 2027.

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.