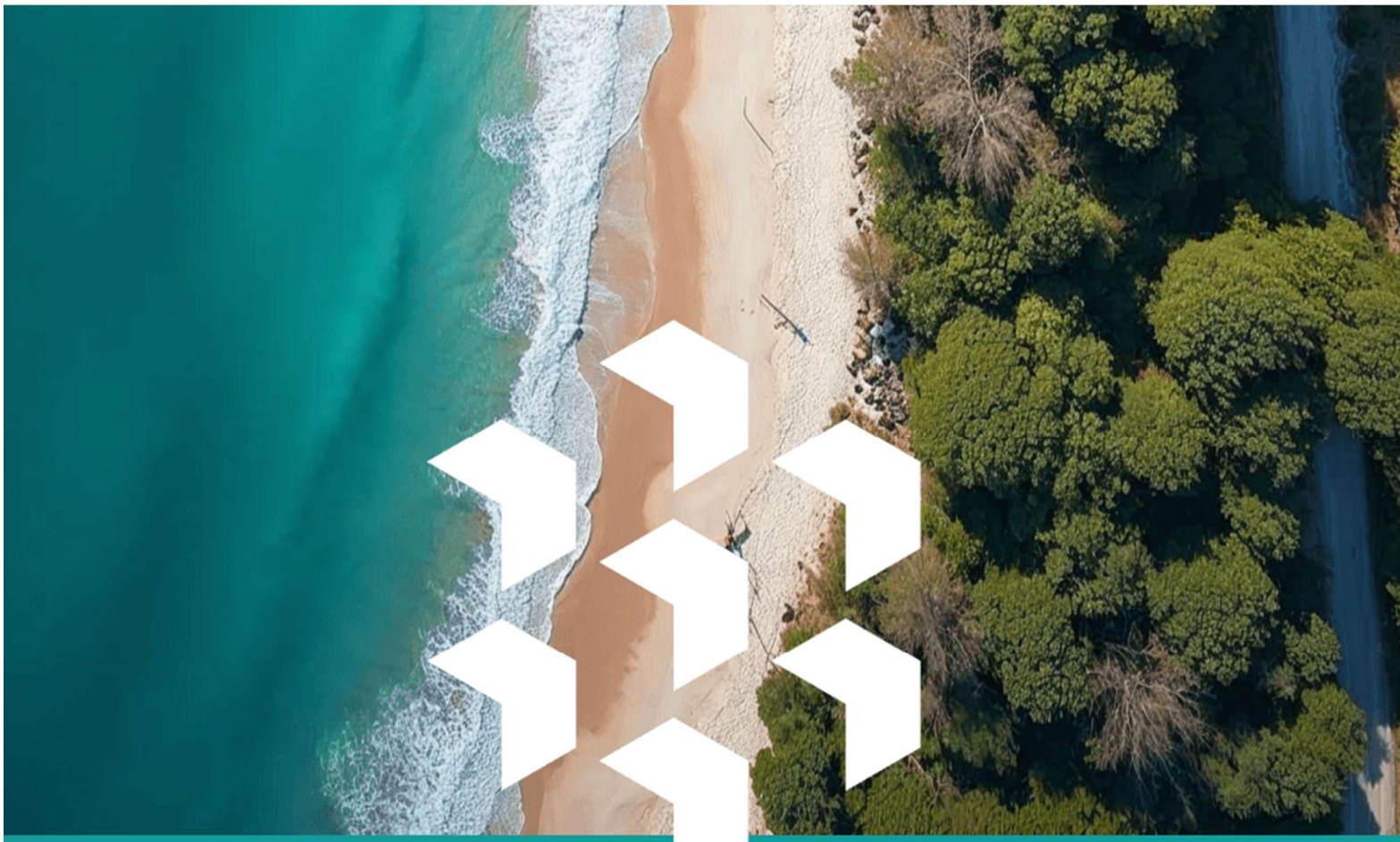


FLPG Monthly Property Newsletter

Discover the monthly data for residential property in Australia.

📈 MARCH 2026 RESIDENTIAL PROPERTY MARKET REPORT

EDITION 04 | FUTURELAND PROPERTY GROUP

STABILITY FORMING. GROWTH ROTATING. POLICY UNCERTAINTY RISING.

MARCH'S DATA CONFIRMS WHAT WE'VE BEEN SIGNALLING SINCE LATE 2025 — THE NATIONAL MARKET HAS FOUND ITS FOOTING. HOWEVER, GROWTH IS NO LONGER BROAD-BASED. IT IS SELECTIVE, YIELD-SENSITIVE, AND INCREASINGLY INFLUENCED BY MACRO POLICY DISCUSSION — PARTICULARLY AROUND CAPITAL GAINS TAX (CGT).

BELOW IS YOUR FULL CAPITAL CITY BREAKDOWN AND STRATEGIC OUTLOOK.

AU NATIONAL OVERVIEW

ACCORDING TO SQM RESEARCH (WEEK ENDING 02 MARCH 2026)

SQM CAPITAL CITIES SUMMARY PAGE

:

- **NATIONAL HOUSE ASKING PRICE:** $1,096,109 (+1.7% ROLLING MONTH)
- **NATIONAL UNIT ASKING PRICE:** $651,659 (+1.2% ROLLING MONTH)
- **NATIONAL COMBINED DWELLING PRICE:** $999,522 (+1.7% ROLLING MONTH)

DESPITE MINOR WEEKLY FLUCTUATIONS, ROLLING MONTHLY FIGURES REMAIN POSITIVE — CONFIRMING UNDERLYING RESILIENCE.

KEY TAKEAWAY:
THE CORRECTION PHASE HAS LARGELY PASSED. THE MARKET IS NOW TRANSITIONING INTO A STABILISED GROWTH CYCLE — UNEVEN, BUT CONSTRUCTIVE.

🏙 CAPITAL CITY SNAPSHOT

SYDNEY

- HOUSES: $2,191,110
- UNITS: $907,946
- COMBINED: $1,667,007

SQM CAPITAL CITIES SUMMARY PAGE

FUTURELAND INSIGHT:
SYDNEY REMAINS CAPITAL-GROWTH DRIVEN, BUT AFFORDABILITY CEILINGS ARE RESHAPING BUYER BEHAVIOUR. UNIT DEMAND IS STRENGTHENING RELATIVE TO DETACHED HOUSING. DEVELOPMENT FEASIBILITY REMAINS TIGHT UNLESS TARGETING PREMIUM STOCK.

MELBOURNE

- HOUSES: $1,344,415
- UNITS: $682,416
- COMBINED: $1,134,758

SQM CAPITAL CITIES SUMMARY PAGE

FUTURELAND INSIGHT:
MELBOURNE IS STABILISING AFTER A MULTI-YEAR MODERATION CYCLE. COUNTER-CYCLICAL ENTRY OPPORTUNITIES EXIST, PARTICULARLY IN WELL-LOCATED MIDDLE-RING SUBURBS. UNIT GROWTH OUTPERFORMANCE SUGGESTS AFFORDABILITY-LED DEMAND RECOVERY.

BRISBANE

- HOUSES: $1,454,465
- UNITS: $875,560
- COMBINED: $1,308,317

SQM CAPITAL CITIES SUMMARY PAGE

FUTURELAND INSIGHT:
SEQ REMAINS ONE OF THE MOST STRUCTURALLY UNDERSUPPLIED MARKETS NATIONALLY. MIGRATION, INFRASTRUCTURE INVESTMENT, AND CONSTRAINED NEW STOCK CONTINUE TO UNDERPIN RESILIENCE. LAND ACQUISITION DISCIPLINE REMAINS CRITICAL FOR DEVELOPERS.

PERTH

- HOUSES: $1,263,090
- UNITS: $785,199
- COMBINED: $1,137,593

SQM CAPITAL CITIES SUMMARY PAGE

FUTURELAND INSIGHT:
PERTH CONTINUES TO LEAD ON ROLLING MONTHLY GROWTH METRICS. YIELD STRENGTH IS SUPPORTING PRICE GROWTH, BUT CONSTRUCTION COST MODELLING MUST REMAIN CONSERVATIVE IN NEW DEVELOPMENT FEASIBILITY.

ADELAIDE

- HOUSES: $1,167,448

- UNITS: $622,707
- COMBINED: $1,069,322

SQM CAPITAL CITIES SUMMARY PAGE

FUTURELAND INSIGHT:
ADELAIDE MAINTAINS STEADY UNDERLYING SUPPORT, DRIVEN BY RELATIVE AFFORDABILITY AND COMPARATIVELY STRONGER RENTAL YIELDS VERSUS EASTERN STATES.

CANBERRA

- HOUSES: $1,260,578
- UNITS: $610,181
- COMBINED: $1,014,725

SQM CAPITAL CITIES SUMMARY PAGE

FUTURELAND INSIGHT:
SHORT-TERM SOFTNESS IS EVIDENT, BUT LONG-TERM STABILITY REMAINS UNDERPINNED BY PUBLIC SECTOR EMPLOYMENT AND CONSISTENT DEMAND FUNDAMENTALS.

HOBART

- HOUSES: $891,740
- UNITS: $521,477
- COMBINED: $835,109

SQM CAPITAL CITIES SUMMARY PAGE

FUTURELAND INSIGHT:
HOBART REMAINS A SECONDARY, YIELD-SENSITIVE MARKET. PERFORMANCE WILL LIKELY TRACK BROADER INVESTOR SENTIMENT AND INTEREST RATE EXPECTATIONS.

🏠 RENTAL MARKET CONDITIONS

VACANCY RATES REMAIN STRUCTURALLY TIGHT ACROSS MOST CAPITAL CITIES, REINFORCING RENTAL GROWTH MOMENTUM

SQM CAPITAL CITIES SUMMARY PAGE

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FUTURELAND INSIGHT:
INVESTOR CASH FLOW POSITIONS ARE IMPROVING NATIONALLY. RENTAL INFLATION REMAINS

ELEVATED, AND POLICY PRESSURE AROUND AFFORDABLE HOUSING SUPPLY IS LIKELY TO INTENSIFY THROUGHOUT 2026.

📜 CAPITAL GAINS TAX (CGT) — WHY IT MATTERS IN 2026

CGT IS BACK IN NATIONAL DISCUSSION AHEAD OF THE MAY FEDERAL BUDGET.

CURRENT SETTINGS (ATO 2025–26)

ATO - CGT DISCOUNT INFORMATION

:

- 50% CGT DISCOUNT FOR INDIVIDUALS (HELD ≥ 12 MONTHS)
- 50% DISCOUNT FOR TRUSTS
- 33.33% DISCOUNT FOR SUPER FUNDS
- MAIN RESIDENCE GENERALLY EXEMPT

ATO - CGT EXEMPTIONS

- UP TO 60% DISCOUNT POSSIBLE FOR QUALIFYING AFFORDABLE RENTAL HOUSING

ATO - CGT DISCOUNT INFORMATION

CBA CONFIRMS THE 50% DISCOUNT MODEL INTRODUCED IN 1999 REMAINS IN PLACE, BUT IS UNDER ACTIVE REVIEW VIA SENATE INQUIRY

CBA - CAPITAL GAINS TAX REFORM

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🔎 WHAT HAPPENS IF CGT IS REFORMED?

IF DISCOUNT IS REDUCED:

- AFTER-TAX RETURNS DECLINE.
- INVESTOR DEMAND MAY SOFTEN AT THE MARGIN.
- DEVELOPMENT EXIT PRICING COULD COMPRESS.
- LONG-TERM HOLD STRATEGIES MAY SHORTEN.

IF SETTINGS REMAIN:

- LONG-TERM CAPITAL GROWTH REMAINS TAX EFFICIENT.
- INVESTOR PARTICIPATION LIKELY STABLE.
- FEASIBILITY MODELLING REMAINS PREDICTABLE.

FUTURELAND INSIGHT:
CGT INFLUENCES BEHAVIOUR — PARTICULARLY TIMING OF SALES AND INVESTOR IRR — BUT SUPPLY, MIGRATION, INTEREST RATES, AND CONSTRUCTION CONSTRAINTS REMAIN THE DOMINANT STRUCTURAL DRIVERS OF PRICE MOVEMENT.

🧠 FUTURELAND STRATEGIC OUTLOOK — MARCH 2026

1. NATIONAL MARKET STABILISED.
2. RENTAL MARKETS REMAIN UNDERSUPPLIED.
3. SEQ AND WA CONTINUE TO SHOW STRONGEST MOMENTUM.
4. CGT DEBATE INTRODUCES UNCERTAINTY — NOT SYSTEMIC COLLAPSE RISK.
5. DEVELOPERS MUST STRESS-TEST FEASIBILITY MODELS AGAINST:
    - EXIT VALUE SENSITIVITY
    - HOLDING PERIOD ADJUSTMENTS
    - TAX SCENARIO OVERLAYS

MARKETS REWARD DISCIPLINE, NOT EMOTION.

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FOR SUBURB-LEVEL INSIGHTS, FEASIBILITY ASSESSMENTS, OR STRATEGIC ADVICE ON YOUR NEXT ACQUISITION OR DEVELOPMENT OPPORTUNITY, REACH OUT TO THE FUTURELAND TEAM — WE'RE HERE TO HELP YOU MAKE INFORMED, FORWARD-LOOKING DECISIONS.

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