

Thoroughbred Market Report



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OCTOBER 2025



*Frankel is the leading European sire by yearling average so far in 2025, with 25 sold for an average of \$1,046,603/€900,079
Photo courtesy Juddmonte*

TABLE OF CONTENTS

SECTION 1: YEARLING MARKET UPDATE	1
SECTION 2: WORLDWIDE SALES TICKER	3
SECTION 3: KENTUCKY NOVEMBER SALES PREVIEW	6
SECTION 4: BILL'S TWEETS	9

IN THIS ISSUE – Midyear Northern Hemisphere APEX Ratings

- European Yearling Sales through Tattersalls October Book 1 continued their strong run, with overall receipts reaching €421.3 million (+2%) and averages +6% year-over-year, as **Frankel** (\$1,046,603) and **Dubawi** (\$986,187) again topped all sires, followed by **Night of Thunder** (\$647,878) and **Wootton Bassett** (\$540,727), while **Baaeed** led first-year sires (\$254,644) amid strong middle-market gains across Europe.
- Kentucky November Sales catalogues are down 11% (–425 head) from last year, with Fasig-Tipton off by a third (213) and Keeneland down 9% (3,083). Uncle Mo's sons dominate the leaderboards: Yaupon tops sires of weanlings with 66 catalogued, followed by **Gunite** (50), **Taiba** (44), **Arabian Lion** (37), and **Forte** (37); Hill 'n' Dale's F2026 **Arabian Knight** leads sires by in-foal mares (41), ahead of three more sires with first foals next year- **Domestic Product** and **National Treasure** (30 each), and Seize the Grey (26). **Yaupon** also figures in the top 5 on this list, with 27 in foal mares catalogued from his fourth crop.
- Worldwide Sales Tickers for the European yearling sales between Keeneland September and Tattersalls October 3.
- Bill's Tweets, which cover commentary from the October European yearling sales.

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<https://billoppenheim.com/abouttmr.php> or email emily@billoppenheim.com

SECTION 1: YEARLING MARKET UPDATE



*Tattersalls October 1 Sale Topper- lot 90 Sea The Stars x Crystal Zvezda (Dubawi)
Sold for 3.7M guineas to Godolphin
Consigned by Longview Stud*

EUROPEAN YEARLING SALES EDGE FORWARD

Frankel & Dubawi Top Averages, Night of Thunder & Wootton Bassett 3-4

The benchmark for European yearling sales was established in 2022, when Tattersalls catalogued 550 yearlings which grossed 126,671,000 guineas and averaged 298,752 gns, and the total European yearling market through the end of the Tattersalls October Sale (which included a small Book 4 until this year) in 2022 grossed €406.4 million. There was a largely unexplained dip in 2023 but the sales came roaring back in 2024 when 449 yearlings catalogued in October Book 1– 18% fewer than in 2022 – topped the previous record gross at 127,823,000 gns and the average shot up to 370,501 guineas – 24% higher than the 2022 average; the corresponding total European market to the end of the Tatts sale also edged above the previous high at €411,244,100 and the average reached €100,524 compared to the 2022 average of €96,280.

This year October 1 catalogued 537 yearlings – 20% more than last year and more comparable with the 550 catalogued in 2022. Given that hefty rise in the number catalogued the Book 1 average was never going to hit the heights it did in 2024. The gross (including private sales reported by the end of the sale) did, as it should have, top the previous best at 129,055,000 gns but the average dropped 14% - neither surprising nor alarming – to 318,654 gns, which was still 7% higher than the 2022 Book 1 average, when a similar number had been catalogued.

For the entire European market to date 3,953 yearlings have grossed a new record €421,300,951 and averaged €106,578. The gross was €10 million, or 2%, higher than last year and 4% higher than in 2022; the average was 6% higher than last year and 11% higher than in 2022. What was striking, and potentially significant this year, was a rise in the clearance rate to 79% and impressive gains at some of the lesser sales. Tattersalls Ireland's Fairyhouse yearling sale had never grossed over €14.1 million, yet this year grossed €20,631,300 and the average broke €30,000 for the first time at €36,006 – with 85.5% of those catalogued sold. Similarly Goffs Orby Book 2 (formerly the Sportsman's Sale) was up more than 20% in both gross and average from last year; and even Goffs flagship sale, Orby 1, had a 23% rise in median even though the gross and average were only marginally up from 2024. These results all suggest the 'middle market', however that is defined, is strengthening and to some extent reversing the trend we call 'polarization'.

Also good news that the European market top isn't weakening at the same time. Frankel is the leading European sire by average at this point in proceedings, with 25 yearlings averaging \$1,046,603 in US dollars. Dubawi has had just eight yearlings sell this year but they have averaged \$986,187. Ranking third and fourth are the newly minted superstars Night of Thunder (55/\$647,878) and Wootton Bassett (68/\$540,727). Leading first-year sire was Baaeed, as he should have been, with 38 yearlings averaging \$254,644.

SECTION 1: EUROPEAN SIRES OF YEARLINGS- TOP 50 SIRES BY AVERAGE

Euro sires with 2+ yearlings sold in 2025- Thru October 18, 2025

SIRE NAME	YOB	HIS SIRE	FFLS	ST	2025 FEE	2023 FEE	# RING	# SOLD	US AVG	US MED
FRANKEL	2008	GALILEO	2014	ENG	350,000	275,000	32	25	1,046,603	703,714
DUBAWI	2002	DUBAI MILLENNIUM	2007	ENG	350,000	350,000	11	8	986,187	781,335
NIGHT OF THUNDER	2011	DUBAWI	2017	IRE	150,000	100,000	64	55	647,878	460,177
WOOTTON BASSETT	2008	IFFRAAJ	2013	DEAD	300,000	150,000	73	68	540,727	316,638
SEA THE STARS	2006	CAPE CROSS	2011	IRE	250,000	180,000	73	67	427,246	231,299
LOPE DE VEGA	2007	SHAMARDAL	2012	IRE	175,000	125,000	67	56	380,784	313,136
KINGMAN	2011	INVINCIBLE SPIRIT	2016	ENG	125,000	125,000	36	28	358,009	334,403
SIYOUNI	2007	PIVOTAL	2012	FR	200,000	150,000	39	34	341,831	228,317
NO NAY NEVER	2011	SCAT DADDY	2016	IRE	125,000	175,000	81	65	290,398	155,752
ZARAK	2013	DUBAWI	2019	FR	80,000	60,000	27	26	277,598	193,193
BAAEED	2018	SEA THE STARS	2024	ENG	65,000	80,000	53	38	254,644	210,693
TOO DARN HOT	2016	DUBAWI	2021	ENG	90,000	40,000	57	46	224,543	139,931
BLUE POINT	2014	SHAMARDAL	2021	IRE	100,000	35,000	100	89	206,989	154,796
CAMELOT	2009	MONTJEU	2015	IRE	75,000	60,000	61	52	206,733	118,077
NEW BAY	2012	DUBAWI	2018	IRE	75,000	75,000	64	59	197,979	167,831
HAVANA GREY	2015	HAVANA GOLD	2020	ENG	PVT	18,500	100	92	173,678	140,181
MEHMAS	2014	ACCLAMATION	2018	IRE	70,000	60,000	104	87	169,391	140,002
ST MARK'S BASILICA	2018	SIYOUNI	2023	IRE	40,000	65,000	64	57	164,690	118,880
STARSPANGLED BANNER	2006	CHOISIR	2012	IRE	45,000	50,000	91	83	156,210	105,002
FARHH	2008	PIVOTAL	2015	ENG	PVT	PVT	2	2	141,365	141,365
STARMAN	2017	DUTCH ART	2023	IRE	10,000	15,000	92	90	140,667	95,137
NATHANIEL	2008	GALILEO	2014	ENG	20,000	15,000	26	25	134,858	98,001
DARK ANGEL	2005	ACCLAMATION	2009	IRE	60,000	60,000	65	55	131,089	81,936
PALACE PIER	2017	KINGMAN	2023	ENG	32,000	50,000	48	46	130,603	92,981
TEOFILO	2004	GALILEO	2009	IRE	30,000	30,000	10	9	124,628	139,859
SOLDIER HOLLOW	2000	IN THE WINGS	2009	DEAD	-	-	4	4	121,167	133,983
GHAIIYATH	2015	DUBAWI	2022	IRE	20,000	25,000	90	77	118,459	90,908
BLACKBEARD	2020	NO NAY NEVER	2024	IRE	17,500	25,000	67	57	113,966	77,398
SIOUX NATION	2015	SCAT DADDY	2020	IRE	30,000	17,500	133	127	112,620	88,522
KODIAC	2001	DANEHILL	2008	IRE	25,000	40,000	43	38	110,804	80,432
MINZAAL	2018	MEHMAS	2024	IRE	12,500	15,000	87	81	109,881	77,001
STUDY OF MAN	2015	DEEP IMPACT	2021	ENG	25,000	12,500	15	12	94,097	85,584
PROTECTIONIST	2010	MONSUN	2018	DEAD	-	6,500	3	2	91,458	91,458
PINATUBO	2017	SHAMARDAL	2022	ENG	30,000	35,000	50	42	88,495	58,653
INVINCIBLE SPIRIT	1997	GREEN DESERT	2004	RETIRED	-	PVT	23	18	88,146	60,527
GALIWAY	2011	GALILEO	2017	FR	30,000	30,000	13	13	87,952	98,001
PERFECT POWER	2019	ARDAD	2024	ENG	7,500	15,000	36	32	87,020	65,600
HELLO YOUNZAIN	2016	KODIAC	2022	FR	40,000	22,500	22	17	84,138	58,801
SANDS OF MALI	2015	PANIS	2022	IRE	-	5,000	12	10	82,131	66,238
SAXON WARRIOR	2015	DEEP IMPACT	2020	IRE	15,000	35,000	77	69	80,069	47,211
CHURCHILL	2014	GALILEO	2019	IRE	25,000	30,000	72	57	79,571	67,287
STRADIVARIUS	2014	SEA THE STARS	2024	ENG	10,000	10,000	14	13	79,490	76,227
SEA THE MOON	2011	SEA THE STARS	2016	ENG	22,500	25,000	45	35	78,596	61,002
NEATICO	2007	MEDICEAN	2016	GER	-	-	2	2	77,477	77,477
SHOWCASING	2007	OASIS DREAM	2012	ENG	35,000	45,000	78	69	76,681	56,694
OASIS DREAM	2000	GREEN DESERT	2005	ENG	15,000	20,000	20	18	75,567	48,999
GLENEAGLES	2012	GALILEO	2017	IRE	20,000	17,500	34	28	75,445	46,357
INTELLO	2010	GALILEO	2015	FR	8,000	8,000	7	4	74,135	70,475
TORQUATOR TASSO	2017	ADLERFLUG	2024	GER	-	20,000	18	16	67,162	52,428
NAVAL CROWN	2018	DUBAWI	2024	IRE	9,000	15,000	42	36	66,940	58,825

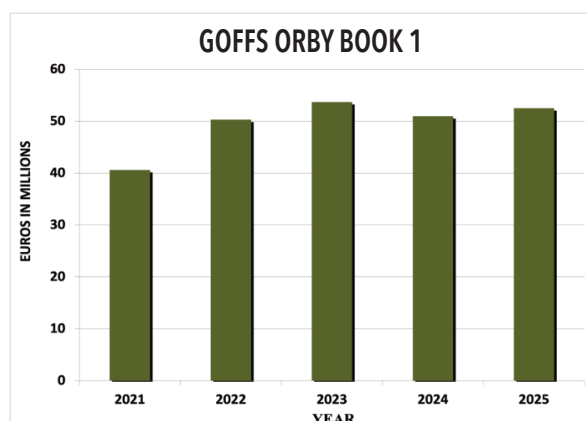
[For a complete roster of all 169 European sires with yearlings sold at 2025 sales, please click here](#)

SECTION 2: WORLDWIDE SALES TICKER

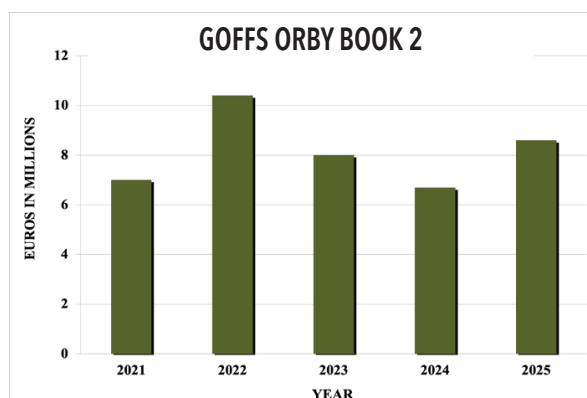
EUROPEAN YEARLINGS THROUGH OCTOBER 18



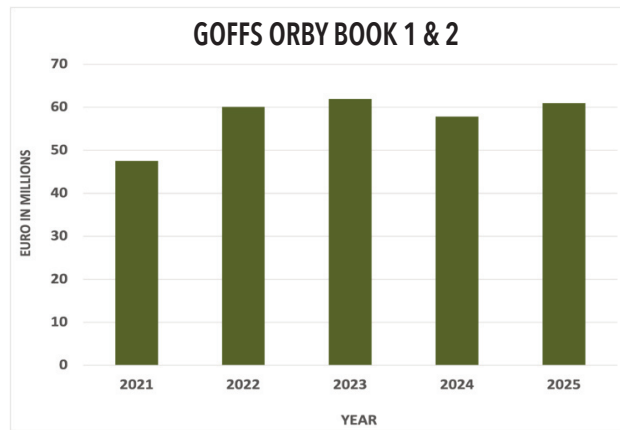
YEAR	CAT	RING	SOLD	% W/D	% S/R	% S/C	GROSS €	AVG €
2025	670	619	573	7.6%	92.6%	85.5%	20,631,300	36,006
2024	830	772	618	7.0%	80.1%	74.5%	13,669,900	22,120
2023	762	705	592	7.5%	84.0%	77.7%	14,068,100	23,764
2022	610	570	505	6.6%	88.6%	82.8%	13,384,500	26,504
2021	590	539	472	8.6%	87.6%	80.0%	13,456,151	28,509



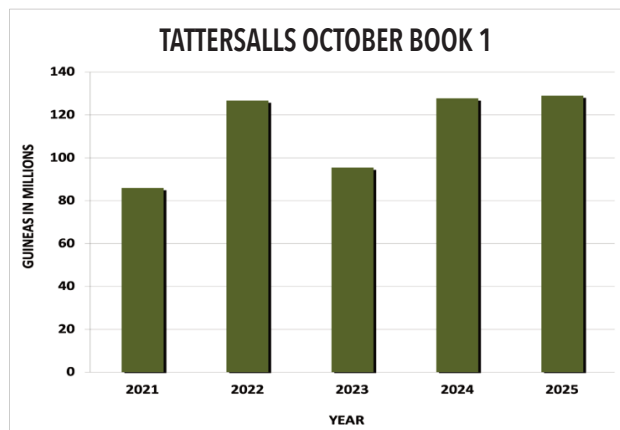
YEAR	CAT	RING	SOLD	% W/D	% S/R	% S/C	GROSS €	AVG €
2025	469	435	393	7.2%	90.3%	83.8%	52,492,500	133,569
2024	519	466	399	10.2%	85.6%	76.9%	51,082,500	128,026
2023	545	497	438	8.8%	88.1%	80.4%	53,770,500	122,764
2022	515	467	414	9.3%	88.7%	80.4%	50,204,500	121,267
2021	444	409	372	7.9%	91.0%	83.8%	40,581,500	109,090



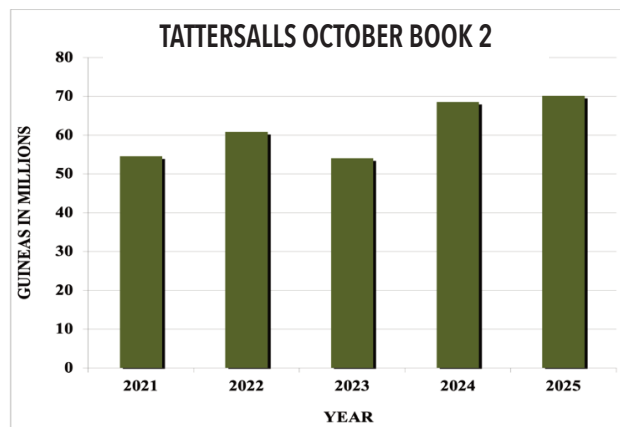
YEAR	CAT	RING	SOLD	% W/D	% S/R	% S/C	GROSS €	AVG €
2025	435	394	338	9.4%	85.8%	77.7%	8,550,000	25,296
2024	480	449	332	6.5%	73.9%	69.2%	6,706,300	20,200
2023	512	464	350	9.4%	75.4%	68.4%	8,097,500	23,136
2022	525	480	415	8.6%	86.5%	79.0%	10,382,000	25,017
2021	407	368	337	9.6%	91.6%	82.8%	6,967,300	20,674



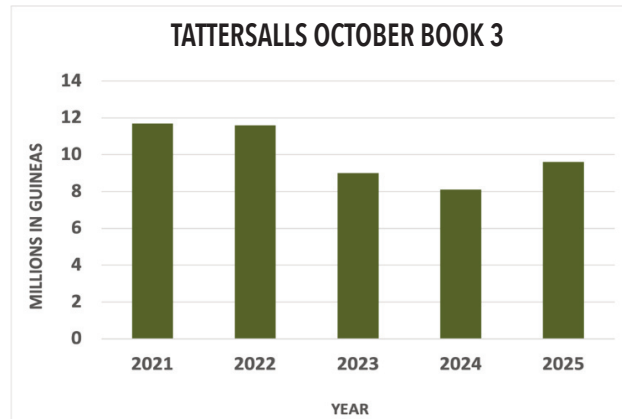
YEAR	CAT	RING	SOLD	% W/D	% S/R	% S/C	GROSS €	AVG €
2025	904	829	731	8.3%	88.2%	80.9%	61,042,500	83,505
2024	999	915	731	8.4%	79.9%	73.2%	57,788,800	79,054
2023	1057	961	788	9.1%	82.0%	74.6%	61,868,000	78,513
2022	1040	947	829	8.9%	87.5%	79.7%	60,586,500	73,084
2021	851	777	709	8.7%	91.2%	83.3%	47,548,800	67,065



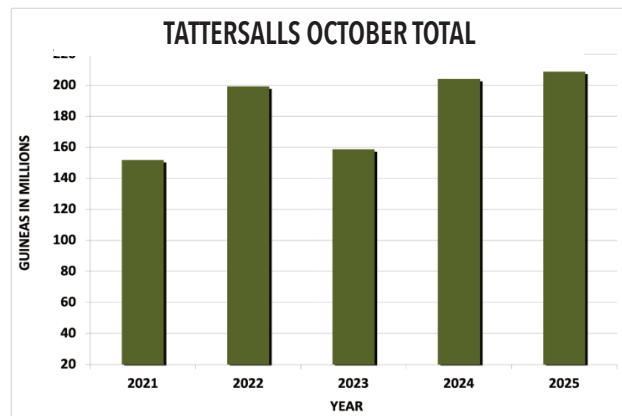
YEAR	CAT	RING	SOLD	% W/D	% S/R	% S/C	GROSS (gns)	AVG (gns)
2025	537	474	405	11.7%	85.4%	75.4%	129,055,000	318,654
2024	449	393	345	12.5%	87.8%	76.8%	127,823,000	370,501
2023	532	470	391	11.7%	83.2%	73.5%	95,395,000	243,977
2022	550	489	424	11.1%	86.7%	77.1%	126,671,000	298,752
2021	502	452	375	10.0%	83.0%	74.7%	86,369,000	230,317



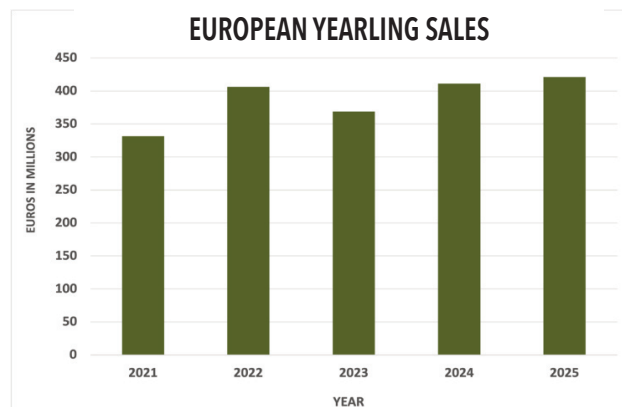
YEAR	CAT	RING	SOLD	% W/D	% S/R	% S/C	GROSS (gns)	AVG (gns)
2025	812	722	663	11.1%	91.8%	81.7%	70,149,500	105,806
2024	773	697	632	9.8%	90.7%	81.8%	68,517,000	108,413
2023	820	734	626	10.5%	85.3%	76.3%	53,978,500	86,228
2022	821	732	633	10.8%	86.5%	77.1%	60,780,500	96,020
2021	808	736	631	8.9%	85.7%	78.1%	54,512,000	86,390



YEAR	CAT	RING	SOLD	% W/D	% S/R	% S/C	GROSS (gns)	AVG (gns)
2025	562	507	409	9.8%	80.7%	72.8%	9,575,504	23,412
2024	571	503	410	11.9%	81.5%	71.8%	8,141,700	19,858
2023	649	574	482	11.6%	84.0%	74.3%	9,080,000	18,838
2022	642	553	481	13.9%	87.0%	74.9%	11,647,600	24,215
2021	612	547	477	10.6%	87.2%	77.9%	10,660,650	22,349



YEAR	CAT	RING	SOLD	% W/D	% S/R	% S/C	GROSS (gns)	AVG (gns)
2025	1,911	1,703	1,477	10.9%	86.7%	77.3%	208,780,004	141,354
2024	1,874	1,654	1,416	11.7%	85.6%	75.6%	204,561,700	144,464
2023	2,111	1,862	1,531	11.8%	82.2%	72.5%	158,567,500	103,571
2022	2,098	1,847	1,583	12.0%	85.7%	75.5%	199,325,100	125,916
2021	2,020	1,809	1,542	10.4%	85.2%	76.3%	151,658,350	98,352



YEAR	CAT	RING	SOLD	% W/D	% S/R	% S/C	GROSS €	AVG €
2025	5,001	4,556	3,953	8.9%	86.8%	79.0%	421,300,951	106,578
2024	5,560	5,055	4,091	9.1%	80.9%	73.6%	411,244,100	100,524
2023	5,654	5,140	4,234	9.1%	82.4%	74.9%	368,962,468	87,143
2022	5,494	4,954	4,221	9.8%	85.2%	76.8%	406,399,700	96,280
2021	5,144	4,671	3,940	9.2%	84.4%	76.6%	331,392,011	84,110

SECTION 3: KENTUCKY NOVEMBER SALES PREVIEW



*Arabian Knight has 41 in-foal mares catalogued
at the Kentucky November Sales
Photo courtesy Hill'n'Dale & Louise Reinagel*



*Yaupon, leads the pack with 66 weanlings catalogued
at the Kentucky November Sales
Photo courtesy Spendthrift*

(at last count) this year. Keeneland's sale will be eight sessions this year versus nine last year.

Spendthrift's **Yaupon** is the Leading North American Freshman Sire this year with 19 winners, 5 Black-Type Winners, and \$1,683,315 in progeny earnings - \$680,000 more than current second-place holder Maxfield. Not entirely surprisingly therefore Yaupon is the leading sire of weanlings by number catalogued in the November Sale, with 66. Four F2025 sires with their first weanlings this year occupy the next four spots – Three Chimneys' **Gunite** (50) and Spendthrift stallions **Taiba** (44), **Arabian Lion** (37), and **Forte** (37). Hill 'n' Dale's **Arabian Knight** (don't confuse the two), like Yaupon a son of Uncle Mo, is the leading sire by number of in-foal mares catalogued, with 41, followed by three other F2026 sires with their first mares in foal: Ashford's **Domestic Product** (30), Spendthrift's **National Treasure** (30), and Gainesway's **Seize The Grey** (26). The only top-five sire by number of mares catalogued in foal who is not a first-crop covering sire is - well, look here – **Yaupon**, with 27 mares catalogued in foal.

KENTUCKY NOVEMBER SALES DOWN 425 HORSES (11%) IN NUMBER CATALOGUED

Uncle Mo's sons Yaupon and Arabian Knight Lead in Numbers Catalogued

One of the most striking features of the upcoming Kentucky November sales – Fasig Tipton's Night of the Stars (can we call it that again?) and Keeneland's November Sale – is the decline in the number of horses catalogued from last year. Fasig-Tipton's catalogue is down by a third, from 320 last year to 213 (at last count) this year, while Keeneland is down by 9% (318 head) from 3,401 catalogued in 2024 to 3,083 (at last count) this year. Combined there are 425 fewer horses catalogued, an 11% drop from 3,721 last year to 3,296



Gunite, leading first-crop
stallion by number of weanlings
catalogued at Kentucky
November sales
Photo courtesy Coolmore

44 SIRES WITH 14+ WEANLINGS CATALOGUED, KENTUCKY NOVEMBER SALES

SIRE NAME	FFLS	HIS SIRE	STANDS	2025 FEE	2024 FEE	2025 YRLG # SOLD	2025 YRLG AVG (USD)	APEX A RNR INDEX	# CAT.	# COLTS	# FILLIES	FT NOV	KEE NOV	KEE BK1
YAUPON	2023	UNCLE MO	KY	25,000	25,000	81	173,604	-	66	37	29	5	61	3
GUNITE	2025	GUN RUNNER	KY	30,000	35,000	-	-	-	50	32	18	4	46	3
TAIBA	2025	GUN RUNNER	KY	30,000	35,000	-	-	-	44	23	21	6	38	1
ARABIAN LION	2025	JUSTIFY	KY	20,000	30,000	-	-	-	37	20	17	1	36	1
FORTE	2025	VIOLENCE	KY	45,000	50,000	-	-	-	37	22	15	5	32	4
PRACTICAL JOKE	2019	INTO MISCHIEF	KY	75,000	45,000	70	162,385	1.91	35	17	18	3	32	6
JACKIE'S WARRIOR	2024	MACLEAN'S MUSIC	KY	25,000	45,000	68	249,623	-	33	16	17	3	30	0
VEKOMA	2022	CANDY RIDE	KY	35,000	15,000	68	173,564	3.74	31	20	11	2	29	5
MCKINZIE	2022	STREET SENSE	KY	75,000	30,000	57	191,877	2.73	29	13	16	-	29	1
ELITE POWER	2025	CURLIN	KY	50,000	50,000	-	-	-	27	11	16	2	25	5
MAGE	2025	GOOD MAGIC	KY	25,000	25,000	-	-	-	27	18	9	1	26	3
ZANDON	2025	UPSTART	KY	10,000	12,500	-	-	-	26	14	12	-	26	0
ARCANGELO	2025	ARROGATE	KY	35,000	35,000	-	-	-	25	15	10	1	24	0
CODY'S WISH	2025	CURLIN	KY	65,000	75,000	-	-	-	25	12	13	4	21	6
OSCAR PERFORMANCE	2020	KITTEN'S JOY	KY	45,000	25,000	44	108,408	3.01	25	13	12	2	23	1
OLYMPIAD	2024	SPEIGHTSTOWN	KY	35,000	35,000	75	97,420	-	24	15	9	-	24	0
OMAHA BEACH	2021	WAR FRONT	KY	35,000	40,000	48	134,045	2.58	24	14	10	3	21	2
CYBERKNIFE	2024	GUN RUNNER	KY	15,000	25,000	85	97,823	-	22	13	9	-	22	0
JACK CHRISTOPHER	2024	MUNNINGS	KY	25,000	40,000	110	115,959	-	22	12	10	2	20	0
TWO PHIL'S	2025	HARD SPUN	KY	10,000	12,500	-	-	-	22	10	12	3	19	0
ANNAPOLIS	2025	WAR FRONT	KY	12,500	12,500	-	-	-	20	10	10	3	17	1
GOLDEN PAL	2024	UNCLE MO	KY	20,000	25,000	101	140,671	-	19	10	9	-	19	0
MUNNINGS	2012	SPEIGHTSTOWN	KY	65,000	75,000	53	165,525	1.80	19	10	9	3	16	2
PAPPACAP	2025	GUN RUNNER	KY	12,500	12,500	-	-	-	19	8	11	-	19	0
TIZ THE LAW	2022	CONSTITUTION	KY	30,000	20,000	30	144,897	3.64	19	11	8	1	18	0
AUTHENTIC	2022	INTO MISCHIEF	KY	15,000	50,000	57	50,587	0.98	18	13	5	-	18	0
DR. SCHIVEL	2025	VIOLENCE	KY	5,000	12,500	-	-	-	18	8	10	1	17	0
ARMY MULE	2020	FRIESAN FIRE	KY	20,000	25,000	63	83,055	1.56	17	10	7	1	16	0
CHARLATAN	2023	SPEIGHTSTOWN	KY	50,000	50,000	66	102,598	-	16	9	7	-	16	1
NASHVILLE	2024	SPEIGHTSTOWN	KY	15,000	15,000	60	70,800	-	16	13	3	-	16	1
TWIRLING CANDY	2013	CANDY RIDE	KY	60,000	60,000	39	203,358	1.87	16	10	6	3	13	0
CORNICHE	2024	QUALITY ROAD	KY	15,000	25,000	60	192,683	-	15	10	5	-	15	0
LOGGINS	2025	GHOSTZAPPER	KY	7,500	7,500	-	-	-	15	9	6	1	14	0
MAXIMUS MISCHIEF	2021	INTO MISCHIEF	KY	20,000	25,000	30	38,450	1.64	15	10	5	-	15	0
UP TO THE MARK	2025	NOT THIS TIME	KY	25,000	25,000	-	-	-	15	9	6	2	13	1
VINO ROSSO	2021	CURLIN	KY	7,500	20,000	30	18,289	0.83	15	7	8	-	15	0
CITY OF LIGHT	2020	QUALITY ROAD	KY	35,000	35,000	38	140,236	2.19	14	4	10	2	12	1
COMPLEXITY	2022	MACLEAN'S MUSIC	KY	25,000	12,500	16	51,156	2.42	14	9	5	1	13	0
GIRVIN	2020	TALE OF EKATI	KY	25,000	30,000	69	128,471	1.88	14	5	9	1	13	1
MACLEAN'S MUSIC	2014	DISTORTED HUMOR	KY	40,000	40,000	51	105,416	1.16	14	9	5	1	13	0
MANDALOUN	2024	INTO MISCHIEF	KY	15,000	20,000	53	113,990	-	14	7	7	1	13	0
MAXFIELD	2023	STREET SENSE	KY	40,000	35,000	45	165,441	-	14	5	9	-	14	0
SPEAKER'S CORNER	2024	STREET SENSE	KY	10,000	17,500	48	73,028	-	14	4	10	1	13	0
VOLATILE	2022	VIOLENCE	KY	12,500	15,000	41	43,715	0.70	14	5	9	-	14	0

For a complete roster of all 140 sires with weanlings catalogued at the Kentucky November sales, please [click here](#)

52 COVERING SIRES WITH 11+ MARES CATALOGUED, KENTUCKY NOVEMBER SALES

SIRE NAME	FFLS	HIS SIRE	STANDS	2025 FEE	2024 FEE	2025 YRLG # SOLD	2025 YRLG AVG (USD)	APEX A RNR INDEX	# CAT.	FT NOV	KEE NOV	KEE BK 1	KEE BK 2	KEE BK 3+4
ARABIAN KNIGHT	2026	UNCLE MO	KY	30,000	-	-	-	-	41	1	40	2	21	17
DOMESTIC PRODUCT	2026	PRACTICAL JOKE	KY	30,000	-	-	-	-	30	-	30	2	4	24
NATIONAL TREASURE	2026	QUALITY ROAD	KY	40,000	-	-	-	-	30	1	29	1	17	11
YAUPON	2023	UNCLE MO	KY	25,000	25,000	81	173,604	-	27	-	27	0	8	19
SEIZE THE GREY	2026	ARROGATE	KY	30,000	-	-	-	-	26	-	26	0	9	17
CHARLATAN	2023	SPEIGHTSTOWN	KY	50,000	50,000	66	102,598	-	25	-	25	0	6	19
ELITE POWER	2025	CURLIN	KY	50,000	50,000	-	-	-	25	-	25	0	14	11
MUTH	2026	GOOD MAGIC	KY	35,000	-	-	-	-	25	-	25	1	7	17
VEKOMA	2022	CANDY RIDE	KY	35,000	15,000	68	173,564	3.74	25	1	24	4	13	7
MCKINZIE	2022	STREET SENSE	KY	75,000	30,000	57	191,877	2.73	24	2	22	5	13	4
MACLEAN'S MUSIC	2014	DISTORTED HUMOR	KY	40,000	40,000	51	105,416	1.16	23	-	23	0	3	20
PRACTICAL JOKE	2019	INTO MISCHIEF	KY	75,000	45,000	70	162,385	1.91	23	1	22	4	17	1
PRINCE OF MONACO	2026	SPEIGHTSTOWN	KY	30,000	-	-	-	-	23	2	21	0	6	15
TIZ THE LAW	2022	CONSTITUTION	KY	30,000	20,000	30	144,897	3.64	23	-	23	0	7	16
ARMY MULE	2020	FRIESAN FIRE	KY	20,000	25,000	63	83,055	1.56	21	-	21	0	0	21
ANNAPOLIS	2025	WAR FRONT	KY	12,500	12,500	-	-	-	20	-	20	0	2	18
GUN PILOT	2026	GUN RUNNER	KY	17,500	-	-	-	-	20	-	20	0	1	19
FORTE	2025	VIOLENCE	KY	45,000	50,000	-	-	-	19	-	19	0	6	13
COGBURN	2026	NOT THIS TIME	KY	30,000	-	-	-	-	18	-	18	1	9	8
KINGSBARNs	2016	GALILEO	SAF	-	-	-	-	-	18	-	18	0	1	17
CHARGE IT	2026	TAPIT	KY	12,500	-	-	-	-	17	-	17	0	1	16
GUNITE	2025	GUN RUNNER	KY	30,000	35,000	-	-	-	17	-	17	0	3	14
INTO MISCHIEF	2010	HARLAN'S HOLIDAY	KY	250,000	250,000	52	796,538	3.13	17	6	11	10	1	0
NOT THIS TIME	2018	GIANT'S CAUSEWAY	KY	175,000	150,000	70	696,978	3.09	17	6	11	9	2	0
OSCAR PERFORMANCE	2020	KITTEN'S JOY	KY	45,000	25,000	44	108,408	3.01	17	-	17	2	11	4
BEAU LIAM	2023	LIAM'S MAP	KY	6,000	6,000	9	138,666	-	16	-	16	0	0	16
OMAHA BEACH	2021	WAR FRONT	KY	35,000	40,000	48	134,045	2.58	16	-	16	1	6	9
AMERICAN PHAROAH	2017	PIONEEROF THE NILE	JPN	45,000	50,000	31	129,005	2.12	15	-	15	2	6	7
CODY'S WISH	2025	CURLIN	KY	65,000	75,000	-	-	-	15	-	15	0	12	3
CONSTITUTION	2017	TAPIT	KY	110,000	110,000	64	317,437	2.63	15	3	12	6	6	0
MUNNINGS	2012	SPEIGHTSTOWN	KY	65,000	75,000	53	165,525	1.80	15	2	13	2	8	3
NEWGATE	2026	INTO MISCHIEF	KY	20,000	-	-	-	-	15	-	15	0	0	15
OLYMPIAD	2024	SPEIGHTSTOWN	KY	35,000	35,000	75	97,420	-	15	-	15	0	2	13
CITY OF LIGHT	2020	QUALITY ROAD	KY	35,000	35,000	38	140,236	2.19	14	-	14	1	2	11
CYBERKNIFE	2024	GUN RUNNER	KY	15,000	25,000	85	97,823	-	14	-	14	1	1	12
ESSENTIAL QUALITY	2023	TAPIT	KY	50,000	65,000	45	94,055	-	14	1	13	0	5	8
LIFE IS GOOD	2024	INTO MISCHIEF	KY	75,000	85,000	71	323,408	-	14	1	13	0	10	3
MAXFIELD	2023	STREET SENSE	KY	40,000	35,000	45	165,441	-	14	1	13	0	2	11
TAIBA	2025	GUN RUNNER	KY	30,000	35,000	-	-	-	14	-	14	1	3	10
TWIRLING CANDY	2013	CANDY RIDE	KY	60,000	60,000	39	203,358	1.87	14	1	13	0	9	4
LIAM'S MAP	2017	UNBRIDLED'S SONG	KY	40,000	40,000	58	178,043	1.74	13	-	13	0	2	11
NYQUIST	2018	UNCLE MO	KY	175,000	85,000	46	405,543	2.05	13	5	8	5	3	0
UPSTART	2018	FLATTER	KY	25,000	30,000	53	126,028	1.25	13	-	13	0	2	11
VOLATILE	2022	VIOLENCE	KY	12,500	15,000	41	43,715	0.70	13	-	13	0	1	12
CORNICHE	2024	QUALITY ROAD	KY	15,000	25,000	60	192,683	-	12	-	12	0	0	12
DORNOCH	2026	GOOD MAGIC	KY	40,000	-	-	-	-	12	1	11	0	7	4
GOLDEN PAL	2024	UNCLE MO	KY	20,000	25,000	101	140,671	-	12	-	12	0	0	12
GOOD MAGIC	2020	CURLIN	KY	125,000	125,000	65	326,438	2.32	12	2	10	3	7	0
COMPLEXITY	2022	MACLEAN'S MUSIC	KY	25,000	12,500	16	51,156	2.42	11	-	11	0	1	10
INDEPENDENCE HALL	2023	CONSTITUTION	KY	7,500	10,000	33	35,621	-	11	-	11	0	0	11
TACITUS	2023	TAPIT	KY	5,000	10,000	20	37,845	-	11	-	11	0	0	11
UP TO THE MARK	2025	NOT THIS TIME	KY	25,000	25,000	-	-	-	11	-	11	0	3	8

For a complete roster of all 160 covering sires with mares catalogued at the Kentucky November sales, please [click here](#)

SECTION 4: BILL'S TWEETS



Bill Oppenheim @billoppenheim · Oct 9



Top 5 sires in average @Tattersalls1766 Oct 1: #1 Frankel 18/808,889 gns, 2 Dubawi 5/620,000, 3 Night of Thunder 22/611,136, 4 Wootton Bassett 25/579,000, 5 Sea The Stars 30/451,167 @JuddmonteFarms @DarleyStallions @coolmorestud @AgaKhanStuds.



Bill Oppenheim @billoppenheim · Oct 9



Overall very satisfactory results @Tattersalls1766 October 1 as catalogue was +88 (20%) from '24. 395/537 sold through the ring (73.6%) vs 76.8% last year. Gross 127,226,000 gns -597,000 (1/2 of 1%), avg 322,091 (-13%), median 210,000 (-16%). Was never going to match '24 but ok.



Bill Oppenheim @billoppenheim · Oct 8



5 sires have averaged over 500,000 gns @Tattersalls1766 October 1 1st 2 days: 1 Frankel 11/953,182; 2 Dubawi 4/656,250; 3 new ★ Night of Thunder 14/589,643; 4 Sea The Stars 18/555,000; 5 Wootton Bassett 21/545,476 @JuddmonteFarms @DarleyStallions @AgaKhanStuds @coolmorestud



Bill Oppenheim @billoppenheim · Oct 8



The @Tattersalls1766 October 1 yearling sale is 2/3 over. 259 sold/358 catalogued (72%, -6% from '24 with 20% more catalogued), gross 87,677,000 gns (+6%), average 338,521 gns (-5%). But Thursday last year averaged 403,243 gns. Big win if sale grosses 130m gns vs record 127m '24.



Bill Oppenheim @billoppenheim · Oct 6



A note of caution about @Tattersalls1766 October 1 kicking off tomorrow:
2022: 550 cat, 424 sold, 77%; 126,673,000 gns/ 298,732 avg
2023: 532 cat, 391 sold, 73%; 95,395,000/243,977
2024: 449 cat, 345 sold, 77%; 127,823,000/370,501
2025: 537 cat +88 (+17%), a lot to absorb.



Bill Oppenheim @billoppenheim · Oct 6



The phenomenon that is @TMStallions Not This Time continues to rack up impressive numbers. He is the #1 sire of NA 2yo's with 27 2yo winners & is almost \$1.2m ahead of Into Mischief & now is #2 to Into Mischief on the General Sire List, \$3.5m ahead of #3 Gun Runner.



Bill Oppenheim @billoppenheim · Oct 3



The real talking horse to come out of @Goffs1866 Orby is @RathbarryStud @NewgateFarm State of Rest, who was a 10f G1 winner in 4 countries. His 7 yearlings in Orby 1 averaged €89,571 with a median of €90,000 & he also had a €150,000 & an €80,000 in Orby 2. 1st Aussie ylg '26



Bill Oppenheim @billoppenheim · Sep 27



Wootton Bassett got his 5th G2-winning 2yo of 2025 today, Hawk Mountain in the Beresford S., and all but wrapped up his 2nd consecutive European 2yo Sire Championship when Dorset, 4th last out to Zavateri in the G1 National S., won the @Goffs1866 Million to bank €495,000.

↻ You reposted



emily plant @ejplantain · Sep 26



Wootton Bassett has left quite a mark on the breed, and his influence will no doubt be felt for years to come.

@billoppenheim and I planned this article for our September Thoroughbred Market Report- no idea it would be his obituary