

# MBS & TREASURY MARKETS

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## The Day Ahead: Bonds Getting Hit From Tariff Updates, Real or Otherwise

It's been an interesting Monday so far for the bond market (and stock market for that matter). Despite a big **risk-off** move (stocks and yields lower) to start the overnight session, markets gradually unwound that trade starting in Europe. Motivation generally stemmed from a cavalcade of headlines suggesting that US trade partners were "willing to negotiate on tariffs." Then sentiment kicked into overdrive when a headline hit the wires regarding a potential 90 day tariff pause. It has since been debunked, but the some of the associated selling pressure remains. Don't think of this as markets ignoring reality. Rather, yields have simply moved back in line with the prevailing selling trend that began around 4am ET.



### April Palacios

Branch Sales Manager,  
Fairway Independent  
Mortgage Corporation

**P:** (980) 290-4140

**M:** (704) 989-2961

6431 Old Monroe Rd, Suite 201  
Indian Trail North Carolina 28079  
124941



### Jennifer Buenau

Broker/REALTOR, Untied  
Real Estate Queen City

<https://youknowbuenau.com/>

**M:** (845) 800-5878

jennybsellsthecarolinas@gmail.com

7880 Idlewild Rd  
Indian Trail NC 28079-\_\_\_\_

