

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.



Dennis Hughes

Owner MLO,
Lend4less.com

Lend4less.com

P: (209) 602-4900

M: (209) 602-4900

dennis@lend4less.com

2209 Hartvickson Lane
Valley Springs CA 95252

Loan Officer NMLS #178729

Company NMLS #1395260

CA Dept of RE Broker 01001409

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