

MBS & TREASURY MARKETS

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ALERT: MBS Down Just Over an Eighth From Highs

Bonds began losing ground at the start of the 9:30am NYSE open and losses accelerated just now after several tariff-related headlines.

CHINA GOVT REPEATS TARIFF CUT REACHED IN TRADE TALKS WITH US

CHINA FINANCE MINISTRY: TO REDUCE THE 34% TARIFF RATES ON US GOODS TO 10%

CHINA FINANCE MINISTRY: TO PAUSE THE 24% TARIFF RATE ON US GOODS FOR 90 DAYS

MBS are now down 6 ticks (.19) from AM highs. Lenders who published rates near that time (prior to 9:40am, roughly) could technically justify a negative reprice, but we would only expect the jumpiest lenders to consider that at this stage.

10yr yields are up 1bp on the day at 4.478



Stan Bryant

Home Loan Advisor, Silver
Creek Capital Group

www.silvercreekcapitalgroup.com

P: (303) 656-1997

M: (303) 656-1997

stan@silvercreekcapitalgroup.com

2679 Main Street
Littleton Colorado 80120
NMLS 1182738
Colorado Life and Health
Insurance 18150

