MBS & TREASURY MARKETS

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ALERT: NFP Right in Line With Forecast; Some Selling

- Nonfarm Payrolls
 - o 139k vs 130k f'cast, 147k prev
- Unemployment Rate
 - 4.2 vs 4.2 f'cast/prev

As we discussed yesterday, Wednesday's data led the market to price in a slightly weaker result than forecasts indicated. That's why we're seeing a bit of selling in response to the asexpected result (previous month revisions more than offset the 9k beat in NFP, actually).

10yr yields are up 3.7bps at 4.432 and MBS are down 2 ticks (.06).

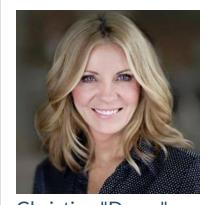


John "Demo" Lender VP of Lending, Demo Mortgage Co.

mbslive.net P: (704) 555-1212 M: (407) 555-1234 10014 Normal Blvd. Charlotte NC 28044

NMLS: 123456





Christina "Demo" Realtor Managing Partner, Real

Estate Company, LLC. mbslive.net P: (704) 555-1212 M: (980) 555-1212

social+test@mbslive.net

12954 S. Broad St. Charlotte NC 28031



