

MBS & TREASURY MARKETS

Daily Coverage. Industry Leading Perspective.

A message from Nickolas Inhelder:

We Make Home Happen.™

Our goal is simple:

To help every family we serve get to “Yes.”

Yes to the loan that unlocks the joy of home ownership.

Yes to the lending solution that meets every client’s unique needs and wants.

That’s why we dedicate our every resource to serve as your personal guide through the lending process, solving problems, building confidence. Aslan has access to every lending option leading to the purchase or refinance of a residential home loan.

This is more than work for us. It is our unique joy in this life to share our collective skill, creativity, and care to bring you and your family right to where you belong.

Let’s make home happen.

CONTACT ME TODAY



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MBS Recap: Correction Continues Despite Tariff Announcements

Correction Continues Despite Tariff Announcements

MBS Recap | Matthew Graham | 4:18 PM

Bonds were moderately weaker to start the day and continued losing ground in the AM hours. Just after noon, new tariff announcements caused a surge of selling in stocks. There was initially some buying in bonds, but not much, and not for long. Tariffs are a double-edge sword for bonds, as we've seen on several occasions over the past few months and today's version was well balanced, ultimately leaving 10yr yields at similar levels before and after the news. Today's weakness adds to the multi-day correction that began last Wednesday and accelerated after Thursday's jobs report. Bond buyers may remain hesitant until getting through more of this week's Treasury auction cycle.





Watch the Video

MBS Morning

10:16 AM Slow Start; Light Calendar This Week

3:26 PM

Market Movement Recap

- 09:57 AM Modestly weaker overnight with MBS down less than an eighth and 10yr up 2bps at 4.367
- 11:09 AM Steady weakness continues. MBS now down 5 ticks (.16) and 10yr up 3.4bps at 4.38
- 02:16 PM Holding sideways near weakest levels in the PM hours. MBS down 5 ticks (.16) and 10yr up 4.6bps at 4.392
- 04:03 PM Still sideways near weakest levels. MBS down 6 ticks (.19) and 10yr up 4bps at 4.387

Lock / Float Considerations

- Follow-through is always a risk when a strong jobs report pushes back against a prevailing rally trend. That's what we saw at the start of the new week, but not in any extreme sense. Bonds are behaving fairly logically here. Unfortunately, there's not much on the calendar to fuel additional logical cause/effect. Bigger risks await with next week's data. The present week is more of a placeholder. The recent end of a rally trend would have us feeling a bit more defensive until this correction has clearly run its course.

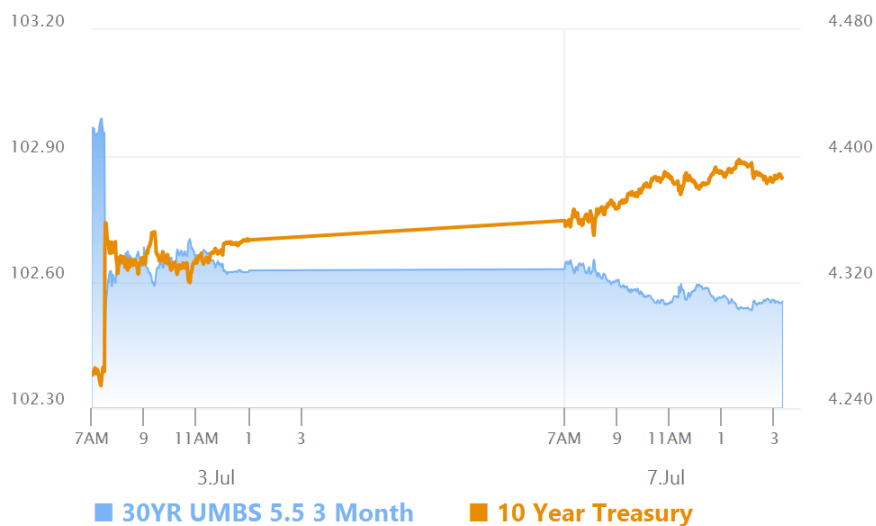
Technicals/Trends in 10yr (why 10yr)

- Ceiling/Support (can be used as "lock triggers")
 - o 4.64
 - o 4.48

Floor/Resistance

- 3.99
- 4.05
- 4.12
- 4.19
- 4.34
- 4.40

MBS & Treasury Markets



MBS

30YR UMBS 5.5

30YR UMBS 6.0

30YR GNMA 5.5

15YR UMBS-15 5.0

US Treasuries

10 YR	4.386%	+0.040%
2 YR	3.899%	+0.016%
30 YR	4.918%	+0.055%
5 YR	3.960%	+0.024%

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