

MBS & TREASURY MARKETS

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The Day Ahead: Heads: They Win. Tails: You Lose

Amid a complete absence of actionable economic data in the new week, stocks and bonds have been left to focus on new developments on the tariff front. It seems like only yesterday that the "90 day pause" went into effect and now, here we are 89 days later with some last-minute edits to the plan. Monday's news involved letters to multiple trade partners announcing new tariff rates effective August 1st--basically a threat to make a deal or else. The more formal nature of the letters (as opposed to social media announcements) got the market's attention despite general tariff fatigue. At the times that stocks were falling, bonds were holding steady. And when stocks held steady, bonds were losing ground.



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



