

UPDATE: First Reaction to Fed Announcement is Stronger

- 25bp cut, as expected
• Dot plot comparison attached. Median at 3.625 (2 more 2025 cuts)

Bonds are rallying as expected in the "2 more cuts" scenario.

10yr down 1.9bps at 4.01 and MBS up an eighth.

Before and After Dot Plot Comparison

Table with 9 columns: Rate, 2025 JUN, 2025 SEP, 2026 JUN, 2026 SEP, 2027 JUN, 2027 SEP, Longer Run JUN, Longer Run SEP. Rows show rates from 5.5 to 2.25 with red and blue dots indicating projections.



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