

MBS & TREASURY MARKETS

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UPDATE: MBS Surge Following Trump Comments

The newswire in question:

TRUMP: INSTRUCTING MY REPRESENTATIVES TO BUY \$200 BLN DOLLARS IN MORTGAGE BONDS

The reaction:



John Hoyer

HoyeHomeTeam -
Berkshire Hathaway
Agents

www.hoyehometeam.com

M: (860) 983-0875

jhoyer@hoyeteam.com

970 Farmington Ave
West Hartford Connecticut 06107



We don't know exactly how this will play out yet, but MBS traders are clearly willing to react this afternoon. Based on the fact that there's almost exactly \$200bln of balance sheet room for the GSEs, this doesn't seem like a random, spur of the moment comment.