

# 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.

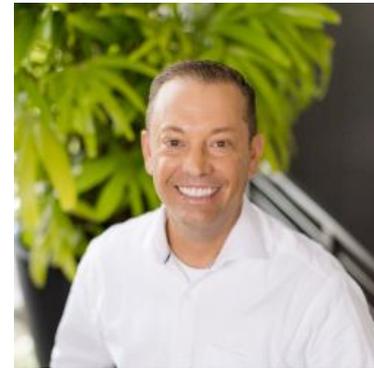
**Yes** to the lending solution that meets every client’s unique needs and wants.

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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## The Day Ahead: Central Banks Cite Oil to Steal Spotlight From Oil

In the space of 2 days, central banks have completely stolen the spotlight from energy prices, but they have relied on energy prices to do so. More simply put, markets had been following oil prices until this week's central bank announcements. At that point, central banks cited energy prices as a reason for bigger upside inflation risk, vanishing rate cut prospects, and in some European cases, increasing prospects for rate hikes. Even Fed Funds Futures in the U.S. are pricing in a 10% chance of a hike at the next meeting as of this morning. This coordinated pivot is reminiscent of other big central bank pivots in the past. Thankfully, this one is heavily dependent on something that can be changed much more quickly than things could change in 2020-2021, but chatter is already increasing regarding the lasting inflation momentum of the current episode, even if the war ends today.

Bonds breaking away from oil:



Just as bad, if not worse, in the U.K.:



**Fed Funds Rate expectation  
after the June Fed meeting**

