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The Day Ahead: Oil Dropping, Bonds Rallying, Data Largely Ignored

From an analytical standpoint, it's hard to offer new and interesting insights when the order of any given day is simply to observe broad war-related sentiment via oil prices. From there, if bonds are diverging, we have a few things to discuss, but if bond yields are following, the case is closed. Today's case is mostly closed as the correlation is mostly there. The only minor divergence arrived after the boatload of AM econ data. It wasn't much of a move, but it was in a friendly direction despite sharply lower jobless claims. Perhaps the market was modestly relieved that year over year PCE "only" rose to 3.5%?

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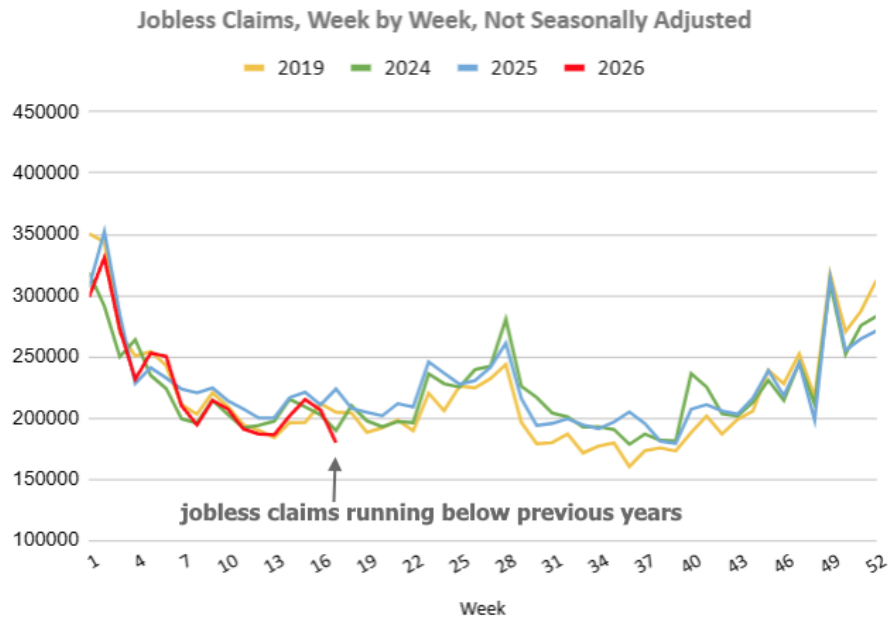

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