

# MBS & TREASURY MARKETS

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## ALERT: New Lows For MBS

Bonds made a full recovery by 9:45am but have been selling off since then. The timing suggests retail investors changing asset allocation after hotter PPI, but could also include another round of concessionary selling ahead of the 30 year auction.

MBS are now down 5 ticks (.16) on the day and at least an eighth of a point from many lenders' rate sheet print times. This makes negative reprices a possibility for jumpier lenders.

10yr yields are up 4.3bps at 4.496.



**Marc Erickson**  
Mortgage Guide, Excel  
Financial Group, LLC

[www.themortgagemarc.com](http://www.themortgagemarc.com)

**P:** (720) 295-0704

**M:** (720) 295-0704

123 N College Avenue  
Fort Collins CO 80524  
1245157



**Ehric Wolfe**  
REALTOR®, Coldwell  
Banker Realty

[www.coloradowolfehomes.com](http://www.coloradowolfehomes.com)

**P:** (970) 691-5299

[ehric@coloradowolfehomes.com](mailto:ehric@coloradowolfehomes.com)

3665 John F Kennedy Parkway  
Fort Collins CO 80525



| ColoradoWolfHomes.com |