

MBS & TREASURY MARKETS

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The Day Ahead: Weaker Start as War News Cycle Shifts

Last week's focus for war-related headlines involved various attempts to hone in on just how close we were to a confirmed preliminary peace deal. The results were predictable with bonds moving to their lowest yields in weeks. The shoe is very much on the other foot to start the new week with headlines saying Iran is pulling out of peace talks until the Israel/Lebanon fighting ends. In addition, the IRGC is said to be taking control of diplomacy and threatening to re-block the strait. With that, 10yr yields jumped back up near the highest levels in over a week and MBS dropped a quick 3/8ths of a point.



Gary Kesler

Executive Finance
Manager, Central Valley
Home Lending

www.cvh lending.com

M: (916) 804-0142

gary@cvhlending.com

3461 Fair Oaks Blvd. Ste 125
Sacramento CA 95864

CVHL NMLS #2455817

MLO NMLS #693579

