

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.

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MBS Recap: Modest Gains Maintained After Intraday Slippage

Modest Gains Maintained After Intraday Slippage

MBS Recap Matthew Graham | 4:12 PM

Slippage is a bit less severe than leakage. Neither of them will turn a green day red, but they both erode morning gains. Today's gains primarily followed a pre-market comment from Trump who said the US was in the middle of final negotiations to end the Iran war. Bonds hit their best levels shortly thereafter and then the slippage set in. The backtracking was more evident in Treasuries with the 10yr losing almost half of the day-over-day gains. MBS managed to hold firmer, and were still broadly in line with the middle of the AM range by 4pm. Friday brings the jobs report. While it hasn't been as big of a flashpoint recently, we'd never rule out a reaction in the event of a big beat/miss.





Watch the Video

MBS Morning

9:14 AM Losses Erased After Another Peace Teaser

3:33 PM

Econ Data / Events

- ○ Jobless Claims (May)/30
 - 225K vs 213K fcast, 215K prev

Market Movement Recap

- 08:42 AM Decently stronger overnight and no drama so far. MBS up 7 ticks (.22) and 10yr down 4.1bps at 4.455
- 11:34 AM Sideways so far and just a hair weaker. MBS still up 6 ticks (.19) and 10yr down 3.1bps at 4.465
- 03:31 PM Treasuries near weakest levels but 10yr still down 2.5bps at 4.471. MBS still up 6 ticks (.19).

Lock / Float Considerations

- 6/4/26 - Just another day confirming war-related impact on oil and bonds. Friday could be the same and in either direction, or war headlines could take the day off. No way to know ahead of time. The jobs report is another wild card. We'd never dismiss its potential entirely. It's certainly lower than historical norms and the takeaways rely on nuance more than normal, but a big enough beat/miss is still a potential source of volatility.

Technical/Trends in 10yr (why 10yr)

- Ceiling/Support (can be used as "lock triggers")
 - 4.80
 - 4.72
 - 4.66
 - 4.59
 - 4.51

- Floor/Resistance
 - 4.19
 - 4.28
 - 4.34
 - 4.43

MBS & Treasury Markets



MBS

30YR UMBS 5.0		+
30YR UMBS 5.5		+
30YR GNMA 5.0		+
15YR UMBS-15 5.0		+

US Treasuries

10 YR	4.475%	-0.021%
2 YR	4.047%	-0.031%
30 YR	4.978%	-0.013%
5 YR	4.186%	-0.031%

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