

# MBS & TREASURY MARKETS

Daily Coverage. Industry Leading Perspective.



## ALERT: Selling Off After Dot Plot

The dots show a sharp bias toward higher rates by year-end and bonds are selling off. MBS down a quick eighth of a point and 10yr up 2.6bps at 4.468. Negative reprices are likely.

**Before and After Dot Plot Comparison**

Rate	2026		2027		2028		Longer Run	
	MAR	JUN	MAR	JUN	MAR	JUN	MAR	JUN
5.5								
5.25								
5.0								
4.75								
4.5								
4.25		•		•				
4.0		•••••		••				
3.75		•••		•••••		••••		••
3.5	••••••••••	••••••••••		••••		••••		••
3.25		••••••••••		••••		••••		••
3.0	••		••••••••••	••••	••••••••••	••••••••••		••••
2.75	••		••••	••	••••	••		••
2.5	••		••	••	••	••		••
2.25			••	••				
2.00								



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