

# MBS & TREASURY MARKETS

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## 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								



**Dale R. Packer, MBA**

Owner/Broker, Great American Lending LLC

[GreatAmericanLending.us](http://GreatAmericanLending.us)

M: (801) 391-6566

[dale@greatamericanlending.us](mailto:dale@greatamericanlending.us)

3918 Badger Ct.

Heber City Utah 84032

MLO-4493

Company-201546

