

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								



Adam Fuller
 Senior Loan Officer,
 Mortgage 1 Inc.
www.m1gr.com/af
 P: (616) 552-4663x2
afuller@mortgageone.com
 3243 East Paris Ave. SE
 Grand Rapids MI 49512
 1317422

