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Mortgage Advisor, Peerless Lending

M: (559) 977-9229

Fresno Ca 93704

NMLS# 1426116



MBS Recap Matthew Graham | 4:10 PM

The screenshot displays the mbslive.com website interface, which is a financial data platform. A large, semi-transparent "PLAY VIDEO" watermark is centered over the main content area. The interface is divided into several sections:

- Top Navigation:** Includes the "mbslive" logo, a search bar, and links for "HELP", "TOOLS", "SETTINGS", and "LOGIN/LOGOUT".
- Left Sidebar:** Contains a "TIME PRICING" section with a table of bid and ask prices for various instruments, and a "MARKETCALENDAR" section showing upcoming events.
- Main Content Area:**
 - REAL TIME CHART (BID):** Displays a line chart for "10YR FIBMA 4.5" with a price of 106.75 (0.00). Below the chart is a table of "CHART OPTIONS" with columns for "BUY", "SELL", "CALL", and "PUT".
 - REAL TIME CHART (ASK):** Displays a line chart for "10 Year Treasury" with a price of 1,827.0 (-0.0010). A green callout box highlights the "10 Year Treasury" data, showing a price of 1,827.00, a change of -0.0010, and a volume of 1,762. Below the chart is a table of "CHART OPTIONS".
 - LIVE NEWS STREAM:** A section on the right side of the main content area displaying real-time news headlines and updates.
- Right Sidebar:** Contains a "WEEKLY LIVE CHART" section with a table of weekly price movements for various instruments.



Watch the Video

MBS Morning

9:49 AM Oil and Yields Starting Out Slightly Lower

3:49 PM

Econ Data / Events

- ○ Jobless Claims (Jul)/04
 - 215.0K vs 218K f'cast, 215K prev

Market Movement Recap

- 09:21 AM Fairly flat overnight and just a hair stronger now. MBS up 2 ticks (.06) and 10yr down just under 1bp at 4.566
- 12:35 PM Additional gains, still correlated with oil prices. MBS up 9 ticks (.28) and 10yr down 3bps at 4.543
- 03:35 PM Off best levels, but still stronger. MBS up 11 ticks (.34) and 10yr down 3bps at 4.543

Lock / Float Considerations

- 7/9/26 - Tempting to view today's additional gains as additional evidence for 4.59% ceiling, but the performance was highly dependent on oil prices. We have yet to see a compelling bond-specific counterattack to push back against the past 1.5 weeks of selling. That said, risk-tolerant clients once again have some room to use 4.59% as a lock trigger.

Technicals/Trends in 10yr (why 10yr)

- Ceiling/Support (can be used as "lock triggers")
 - 4.59
 - 4.51
 - 4.42

- Floor/Resistance
 - o 4.19
 - o 4.28
 - o 4.34
 - o 4.36

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	4.546%	-0.028%
2 YR	4.170%	-0.050%
30 YR	5.057%	-0.020%
5 YR	4.277%	-0.050%

Open Dashboard

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