

Daily Coverage. Industry Leading Perspective.

3803 Ballard Woods Dr
Smithfield KY 40068-

MBS Recap | Matthew Graham | 4:10 PM

The screenshot displays the mbslive.com website interface, which is a financial data portal. The top navigation bar includes the 'mbslive' logo and links for 'HELP', 'TOOLS', 'SETTINGS', and 'LOGIN/REGISTER'. The main content area is divided into several sections:

- TIME PRICING:** A table showing price movements for different time intervals (15, 30, 60, 120, 180, 240, 300, 360, 420, 480, 540, 600, 660, 720, 780, 840, 900, 960, 1020, 1080, 1140, 1200, 1260, 1320, 1380, 1440, 1500, 1560, 1620, 1680, 1740, 1800, 1860, 1920, 1980, 2040, 2100, 2160, 2220, 2280, 2340, 2400, 2460, 2520, 2580, 2640, 2700, 2760, 2820, 2880, 2940, 3000, 3060, 3120, 3180, 3240, 3300, 3360, 3420, 3480, 3540, 3600, 3660, 3720, 3780, 3840, 3900, 3960, 4020, 4080, 4140, 4200, 4260, 4320, 4380, 4440, 4500, 4560, 4620, 4680, 4740, 4800, 4860, 4920, 4980, 5040, 5100, 5160, 5220, 5280, 5340, 5400, 5460, 5520, 5580, 5640, 5700, 5760, 5820, 5880, 5940, 6000, 6060, 6120, 6180, 6240, 6300, 6360, 6420, 6480, 6540, 6600, 6660, 6720, 6780, 6840, 6900, 6960, 7020, 7080, 7140, 7200, 7260, 7320, 7380, 7440, 7500, 7560, 7620, 7680, 7740, 7800, 7860, 7920, 7980, 8040, 8100, 8160, 8220, 8280, 8340, 8400, 8460, 8520, 8580, 8640, 8700, 8760, 8820, 8880, 8940, 9000, 9060, 9120, 9180, 9240, 9300, 9360, 9420, 9480, 9540, 9600, 9660, 9720, 9780, 9840, 9900, 9960, 10020, 10080, 10140, 10200, 10260, 10320, 10380, 10440, 10500, 10560, 10620, 10680, 10740, 10800, 10860, 10920, 10980, 11040, 11100, 11160, 11220, 11280, 11340, 11400, 11460, 11520, 11580, 11640, 11700, 11760, 11820, 11880, 11940, 12000, 12060, 12120, 12180, 12240, 12300, 12360, 12420, 12480, 12540, 12600, 12660, 12720, 12780, 12840, 12900, 12960, 13020, 13080, 13140, 13200, 13260, 13320, 13380, 13440, 13500, 13560, 13620, 13680, 13740, 13800, 13860, 13920, 13980, 14040, 14100, 14160, 14220, 14280, 14340, 14400, 14460, 14520, 14580, 14640, 14700, 14760, 14820, 14880, 14940, 15000, 15060, 15120, 15180, 15240, 15300, 15360, 15420, 15480, 15540, 15600, 15660, 15720, 15780, 15840, 15900, 15960, 16020, 16080, 16140, 16200, 16260, 16320, 16380, 16440, 16500, 16560, 16620, 16680, 16740, 16800, 16860, 16920, 16980, 17040, 17100, 17160, 17220, 17280, 17340, 17400, 17460, 17520, 17580, 17640, 17700, 17760, 17820, 17880, 17940, 18000, 18060, 18120, 18180, 18240, 18300, 18360, 18420, 18480, 18540, 18600, 18660, 18720, 18780, 18840, 18900, 18960, 19020, 19080, 19140, 19200, 19260, 19320, 19380, 19440, 19500, 19560, 19620, 19680, 19740, 19800, 19860, 19920, 19980, 20040, 20100, 20160, 20220, 20280, 20340, 20400, 20460, 20520, 20580, 20640, 20700, 20760, 20820, 20880, 20940, 21000, 21060, 21120, 21180, 21240, 21300, 21360, 21420, 21480, 21540, 21600, 21660, 21720, 21780, 21840, 21900, 21960, 22020, 22080, 22140, 22200, 22260, 22320, 22380, 22440, 22500, 22560, 22620, 22680, 22740, 22800, 22860, 22920, 22980, 23040, 23100, 23160, 23220, 23280, 23340, 23400, 23460, 23520, 23580, 23640, 23700, 23760, 23820, 23880, 23940, 24000, 24060, 24120, 24180, 24240, 24300, 24360, 24420, 24480, 24540, 24600, 24660, 24720, 24780, 24840, 24900, 24960, 25020, 25080, 25140, 25200, 25260, 25320, 25380, 25440, 25500, 25560, 25620, 25680, 25740, 25800, 25860, 25920, 25980, 26040, 26100, 26160, 26220, 26280, 26340, 26400, 26460, 26520, 26580, 26640, 26700, 26760, 26820, 26880, 26940, 27000, 27060, 27120, 27180, 27240, 27300, 27360, 27420, 27480, 27540, 27600, 27660, 27720, 27780, 27840, 27900, 27960, 28020, 28080, 28140, 28200, 28260, 28320, 28380, 28440, 28500, 28560, 28620, 28680, 28740, 28800, 28860, 28920, 28980, 29040, 29100, 29160, 29220, 29280, 29340, 29400, 29460, 29520, 29580, 29640, 29700, 29760, 29820, 29880, 29940, 30000, 30060, 30120, 30180, 30240, 30300, 30360, 30420, 30480, 30540, 30600, 30660, 30720, 30780, 30840, 30900, 30960, 31020, 31080, 31140, 31200, 31260, 31320, 31380, 31440, 31500, 31560, 31620, 31680, 31740, 31800, 31860, 31920, 31980, 32040, 32100, 32160, 32220, 32280, 32340, 32400, 32460, 32520, 32580, 32640, 32700, 32760, 32820, 32880, 32940, 33000, 33060, 33120, 33180, 33240, 33300, 33360, 33420, 33480, 33540, 33600, 33660, 33720, 33780, 33840, 33900, 33960, 34020, 34080, 34140, 34200, 34260, 34320, 34380, 34440, 34500, 34560, 34620, 34680, 34740, 34800, 34860, 34920, 34980, 35040, 35100, 35160, 35220, 35280, 35340, 35400, 35460, 35520, 35580, 35640

Watch the Video

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
 - 4.19
 - 4.28
 - 4.34
 - 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%

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