

MBS & TREASURY MARKETS

Daily Coverage. Industry Leading Perspective.

MBS Recap: Relatively Drama-Free Day



Jay Rodriguez

Independent Mortgage
Advisor, Arbor Financial
Group

rodriguez.team

P: (512) 549-4568

M: (949) 606-2410

jay@rodriguez.team

1805 E Garry Ave
Santa Ana CA 92705
NMLS# 902610



Lyna Hoc

REALTOR®, Lyna Hoc Real
Estate

www.LynaHoc.com

M: (323) 484-4484

Lyna@LynaHoc.com

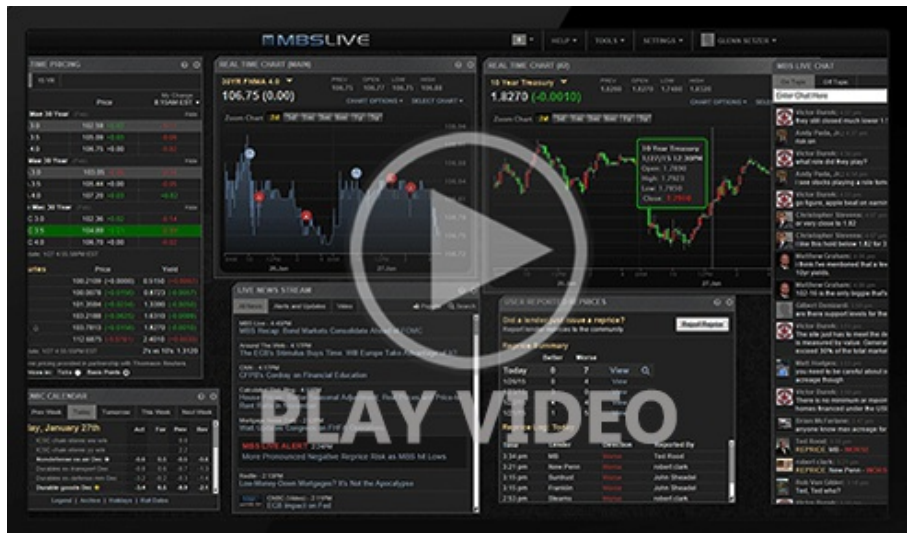
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Relatively Drama-Free Day

MBS Recap Matthew Graham | 5:00 PM

These things happen from time to time. The bond market finally had an uneventful day... sorta. This may seem like a fairly odd claim for any day where yields hit the highest levels in well over a year but those were intraday highs, and they weren't much higher than yesterday's highs. During domestic hours, 10s were mostly in a 2bp range. Additionally, there were no standout market movers for better or worse. This easily meets the definition of uneventful even if it says nothing about the volatility risks over the next 2 days.



Watch the Video

MBS Morning

10:32 AM No News is Good News

3:59 PM

Econ Data / Events

- ○ ADP Jobs
 - 38k vs 47k f'cast, 46k prev

Market Movement Recap

08:36 AM MBS up 3 ticks (.09) and 10yr unchanged at 4.793

01:59 PM MBS up 2 ticks (.06) and 10yr unchanged at 4.792

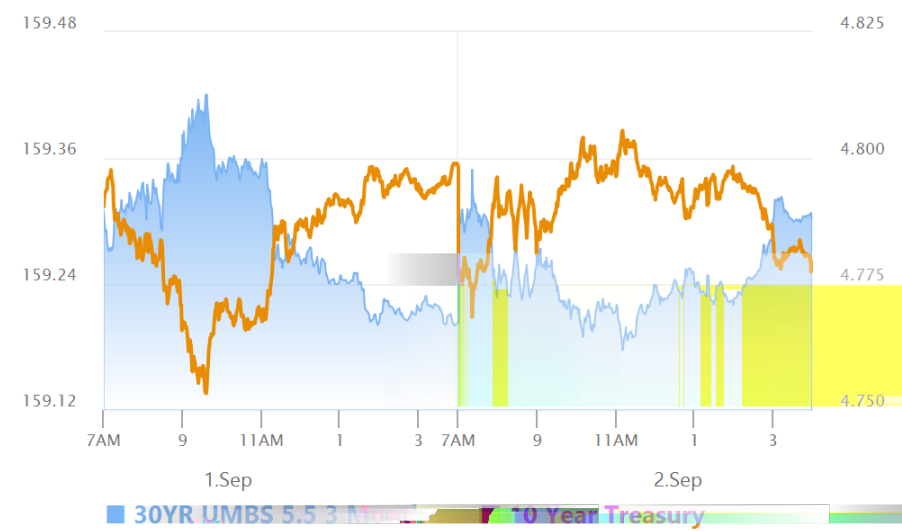
Lock / Float Considerations

- 9/2/26 - (unchanged from yesterday) War headlines and oil price volatility present persistent risks for volatility. It makes sense to remain defensive until there's a clear reversal in the bigger-picture trend.

Technicals/Trends in 10yr (why 10yr)

- Ceiling/Support (can be used as "lock triggers")
 - o 4.80
 - o 4.71
- Floor/Resistance
 - o 4.42
 - o 4.54
 - o 4.62

MBS & Treasury Markets



MBS

30YR UMBS 5.5	+
30YR UMBS 6.0	+
30YR GNMA 5.5	+
15YR UMBS-15 5.0	+

US Treasuries

US Treasuries

10 YR	4.780%	-0.013%
2 YR	4.372%	-0.029%
30 YR	5.259%	-0.016%
5 YR	4.536%	-0.022%

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