

MBS & TREASURY MARKETS

Daily Coverage. Industry Leading Perspective.

A message from John "Demo" Lender:

This is an example of the suite of **marketing tools** included in a subscription to MBS Live! This is an example of how you can co-brand business partners. Try these tools with a [free trial](#).

ALERT: MBS Already Down an Eighth For Some Lenders

More selling pressure after the Dallas Fed Manufacturing Survey, of all things (the second time this report has ever been mentioned by us in 20 years). Some of the charts on this page tell a similar story to last week's S&P

PMI: <https://www.dallasfed.org/research/surveys/tmos/2026/2609#tab-chart>

This isn't the only market mover in play, to be sure, as something is also causing an uptick in oil prices (reports of explosions in several Saudi cites, perhaps?).

10yr yields are up almost 10bps at 5.259 and MBS are down almost 5/8ths, with at least 6 ticks (.19) of that happening after the early lenders released rate sheets. As such, negative reprices are already possible.



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