

MBS & TREASURY MARKETS

Daily Coverage. Industry Leading Perspective.

MBS Recap: Bond-Specific Weakness



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MBS Recap Matthew Graham | 5:16 PM

The screenshot displays the MBSLIVE website with the following sections:

- TIME PICKING:** A table showing price and yield for different maturities (10Y, 5Y, 3Y, 1Y, 6M, 3M, 1M).
- REAL TIME CHART (NAME):** A line chart for 10Y Treasury with a price of 106.75 (0.00) and a yield of 1.8270 (-0.0010).
- 10Y Treasury:** A line chart showing the 10Y Treasury yield over time, with a highlighted box indicating a peak of 1.8270.
- 10Y Treasury:** A line chart showing the 10Y Treasury yield over time, with a highlighted box indicating a peak of 1.8270.
- WEB LIVE CHAT:** A chat window on the right side of the page.
- NEWS STREAM:** A section titled "Live News Stream" with a list of news items.
- USER REPORTS ON PRICES:** A section titled "User Reports on Prices" with a table of user reports.
- PLAY VIDEO:** A large watermark in the center of the page.

MBS Morning

Alert

4:23 PM

Market Movement Recap

11:03 AM MBS down more than 5/8ths and 10yr up 10.5bps at 5.266

Lock / Float Considerations

- 9/28/26 - We continue to recommend waiting until the market shows a stronger desire to rally (without said rally being a response to heavy selling) before adjusting your lock/float game plan. That said, if econ data comes in weak, and bonds recover, there could be a fairly substantial reaction in mortgage rates. As always, the issue is that the data could also come in stronger and only add to the recent upward momentum.

Technicals/Trends in 10yr (why 10yr)

- Ceiling/Support (can be used as "lock triggers")
 - o 5.29
- Floor/Resistance
 - o 4.71
 - o 4.80
 - o 4.83
 - o 4.93
 - o 5.00
 - o 5.14

MBS & Treasury Markets



MBS

30YR UMBS 6.0

30YR UMBS 6.5

30 YR UMBS 6.5
30YR GNMA 6.0
15YR UMBS-15 5.0

US Treasuries

10 YR	5.234%	+0.074%
2 YR	4.926%	+0.068%
30 YR	5.554%	+0.060%
5 YR	5.067%	+0.076%

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