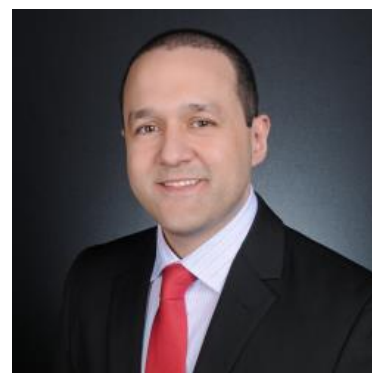


The Day Ahead: Light Calendar Leaves Tech Concerns in Focus

Last week's most notable development was a flight to safety in the bond market precipitated by concerns about a shift in tech sector sentiment. The shift in question was mainly driven by Coreweave which saw shares plummet and corporate debt spreads explode. That cause some concern about spillover to the rest of the tech sector. Treasuries benefited not only from general safe haven demand, but also because the tech jitters implied a slower pace of AI capex and [corporate debt issuance](#) (both of which had previously created upward pressure on bond yields). The NASDAQ is starting the new week well off Friday afternoon's lows and 10yr yields have retreated accordingly. That said, Treasuries remain ready to benefit from any resurgence in AI sector jitters. In the absence of any high-impact economic data, assessing that risk will be this week's main theme.



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