The Day Ahead: Slightly Stronger Start

The bond market continues to decide who it wants to be in Q4, 2026--the harbinger of inflation concerns, debt issuance and economic growth or a safe haven for cash being freed up by AI capex deleveraging. We're starting slightly stronger today with the AI deleveraging trade apparently setting the tone. Movement is too modest to demand any rigorous analysis (Nasdaq lower, yields lower), but at least it's green.

1st Choice Mortgage
Mortgage Broker, 1st Choice Mortgage Company, LLC
375Loan.com
P: (208) 375-5626
3023 E Copper Point Dr
Meridian ID 83642
380736

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