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.

Dennis Tulpa
Mortgage Advisor,
Broadway Mortgage Group
www.broadwaymortgagegroup.com
P: (615) 290-4858
M: (615) 290-4858
dennis@broadwaymortgagegroup.com
132 N Water Ave
Gallatin TN 37066
1146435

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