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.





Brandon Snider
Loan Officer, Maven Mortgage
M: (256) 694-7514
105 1st Ave NE
Cullman AL 35055
181033

© MBS Live, LLC. All rights reserved. This newsletter is a service of MBS Live.