

MBS & TREASURY MARKETS

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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.



Shane Braninburg

Loan Advisor / Investment
Mortgage Specialist,
Barrett Financial Group,
LLC

renohomeloanpro.com

M: (775) 229-5772

shaneb@barrettfinalgroup.com

9805 Double R Blvd Suite 300
Reno NV 89521

