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.





Tyler Tatum
Branch Leader, Movement Mortgage
www.tylertatum.com
P: (404) 751-8463
tyler.tatum@movement.com
333 1st St N #310
Jacksonville Beach FL 32250
NMLS# 791352

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