

MBS & TREASURY MARKETS

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The Day Ahead: Slightly Stronger Start, But Generally Sideways and "Waiting"

Bonds are technically just a hair stronger this morning, but in the slightly bigger picture, nothing has happened yet this week (not that we'd expect that to be the case before 10am on a Monday). The tech stock narrative that precipitated a sharp bond rally last Thursday continues to consolidate in a sideways pattern. Bonds are doing the same. Both are waiting for whatever's next. Wednesday's Fed announcement could be a source of inspiration if any forward guidance manages to slip through Warsh's forward guidance moat.



Nickolas Inhelder

Mortgage Broker, In Clear To Close - InCTC LLC

www.AslanHLC.com

P: (720) 446-8778

M: (858) 229-9533

nick@incleartoclose.com

1777 S. Harrison St.
Denver CO 80210

2037157 - CO, FL

2656899 - AL, CO, FL, SD

