MBS Recap: Tech Jitters are Back. Bonds Like It



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108 CAPITAL MANAGEMENT

Tech Jitters are Back. Bonds Like It

MBS Recap Matthew Graham | 5:07 PM

As has been the case for the past several weeks, the near-term fate of the rate rally is dependent on tech jitters. While those had leveled off in a sideways pattern over the first few days of the week, they resurfaced today, both at the NYSE open and close. The 4pm move was bigger for stocks and directly linked to weak guidance in Intel and Amazon earnings releases. Bonds were already moderately stronger on the day after the 9:30am gains, but improved even more after the 4pm NYSE close.



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MBS Morning

9:48 AM No Whammies From PCE Data. Tech Plunge Helping

Alert

11:58 AM Down More Than an Eighth Since Rate Sheets Came Out

4:49 PM

Econ Data / Events

- Core PCE (m/m) (Sep)
  - 0.3% vs 0.3% f'cast, 0.2% prev
- Core PCE (y/y) (Sep)
  - 3.1% vs 3.1% f'cast, 3% prev
- GDPQ3
  - 3.4% vs 3.2% f'cast, 2.2% prev
- Jobless Claims (Oct)/24
  - 194.0K vs 199K f'cast, 194K prev

Market Movement Recap

09:55 AM fairly sharp rally at 9:30am coincided with NYSE open and heavy losses in a few key tech names

Lock / Float Considerations

- 10/29/26 - As nice as today's tech-inspired bond market gains may be, we're still only scratching the surface when it comes to a true correction in stocks. Bonds should remain responsive to any major

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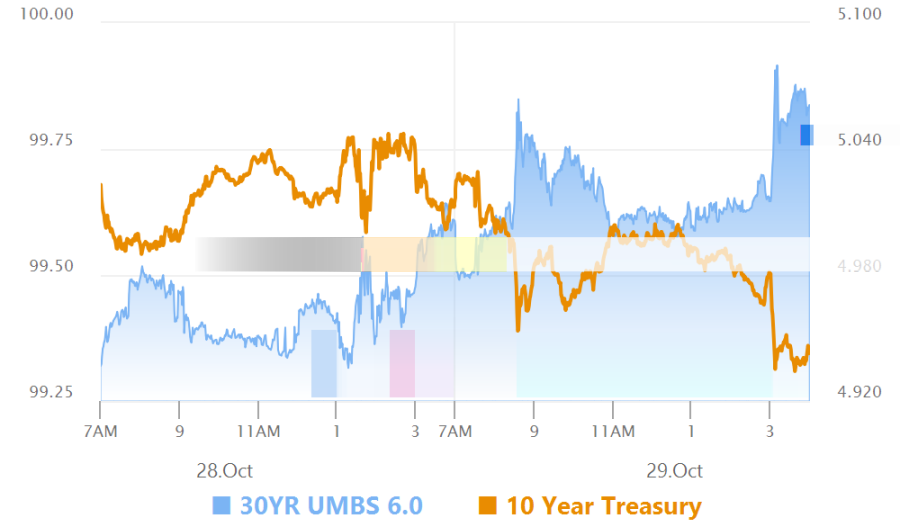
deterioration or recovery in the "tech jitters" narrative. Econ data is in the 3rd row seats until next week at the earliest.

Technicals/Trends in 10yr (why 10yr)

- Ceiling/Support (can be used as "lock triggers")
  - 5.34
  - 5.27
  - 5.14

- Floor/Resistance
  - 4.83
  - 4.93
  - 5.00
  - 5.07

MBS & Treasury Markets



MBS

30YR UMBS 6.0	+
30YR UMBS 6.5	+
30YR GNMA 6.0	+
15YR UMBS-15 5.0	+

US Treasuries

10 YR	4.934%	-0.082%
2 YR	4.592%	-0.106%
30 YR	5.300%	-0.046%
5 YR	4.741%	-0.091%

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