

MBS & TREASURY MARKETS

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UPDATE: Quick Recovery After Anthropic Headlines

FT is reporting Anthropic may not receive an "investment grade" rating after its forthcoming IPO. This would make AI-related financing more expensive and generally contribute to the "tech jitters" that have helped Treasuries/MBS over the past few weeks.

MBS instantly erased most of the losses on the news. 6.0 coupons are now down only 1 tick (.03) versus 4 ticks (.125) before the news. 10yr yields are up 1bp at 4.933, but down more than 2bps since the news came out.



Tan & Samantha Tunador

VP | Sr Loan Officer Team,
Atlantic Coast Mortgage,
LLC

www.TheTunadorGroup.com

P: (703) 919-5875

M: (703) 328-0628

tan@acmllc.com

10 W Market Street NW
Leesburg Virginia 20176

NMLS ID 1166669

NMLS ID 2408374

