MBS & Treasury Markets

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A message from John "Demo" Lender:

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MBS Recap: Bonds Almost Able to Break Even Thanks to Tech Turmoil



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Bonds Almost Able to Break Even Thanks to Tech Turmoil

MBS Recap Matthew Graham | 3:15 PM

Tech stocks embarked on a wild ride starting with earnings releases after the bell yesterday. While today's recap title mentions "breaking even," if we were to measure today's bond market movement versus yesterday's 3pm ET levels, 10yr yields are more than 5bps lower. In other words, those earnings releases created a big late-day rally yesterday and today became largely about trying to hold onto the gains. By mid-day, bonds were a bit weaker with 10yr yields approaching 4.96%. Around 1240pm, news broke regarding Anthropic being unlikely to receive an "investment grade" rating after its IPO. This pushed the NASDAQ even deeper into negative territory and helped bonds make it most of the way back to "unchanged" by 3pm.



Watch the Video

MBS Morning

9:59 AM Bond Yields Not Eager to Follow Stocks Lower

Alert

12:44 PM Weakest Levels

Update

12:53 PM Quick Recovery After Anthropic Headlines

2:47 PM

Econ Data / Events

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- Employment Cost Index
  - 0.8 vs 0.8 f'cast, 0.9 prev

Lock / Float Considerations

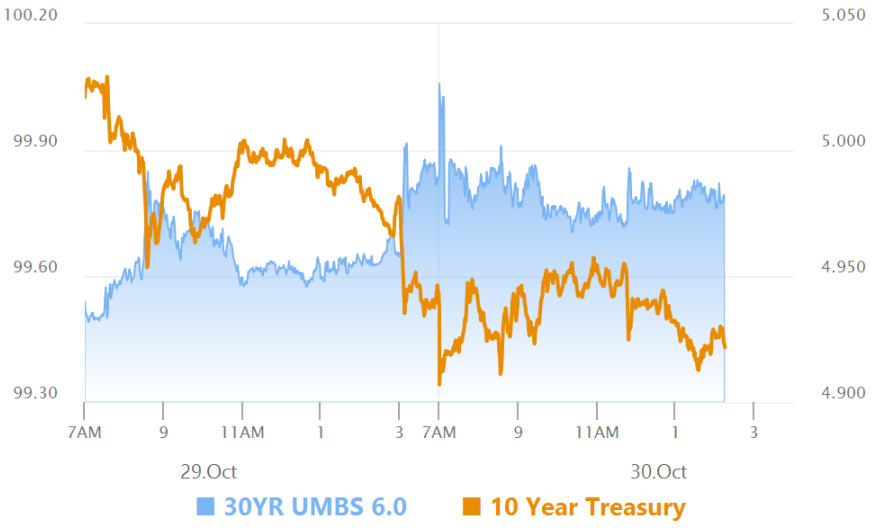
- 10/30/26 - Bonds remain responsive to major developments in the "tech jitters" narrative and that should continue in the weeks ahead. That said, it's taken quite a bit of "jitters" over the past 2 days to result in a moderate improvement in bonds. To some, this would advocate a cautious approach when it comes to lock decisions. Econ data will be increasingly relevant in the week ahead.

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

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MBS
30YR UMBS 6.0
30YR UMBS 6.5

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30YR GNMA 6.0	
15YR UMBS-15 5.0	+

US Treasuries		
10 YR	4.921%	0.000%
2 YR	4.571%	-0.023%
30 YR	5.307%	+0.007%
5 YR	4.712%	-0.033%

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