A message from Marc Erickson:

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MBS Recap: Respectable Resilience Despite Big Stock Rally



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Respectable Resilience Despite Big Stock Rally

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MBS Recap Matthew Graham | 4:26 PM

It ended up being a pleasantly surprising day for the bond market. If the underlying sentiment had been overly bearish, the stock rally gave bonds plenty of cover to move into weaker territory. Instead, the long end of the yield curve made it back into positive territory by the close. By the time we consider that the NASDAQ is barely above the early Nov lows even after today's rally, today's bond market resilience isn't too hard to accept. The bigger question is whether today marks some sort of supportive line in the sand for stocks going forward. From there, any conclusions would need to be tempered, in the short term, by the elevated random volatility risks associated with Thanksgiving week and month-end.



Watch the Video

MBS Morning

10:35 AM AM Volatility Following Huang Reinstatement

4:14 PM

Lock / Float Considerations

- 11/23/26 - Several mixed signals and competing narratives are emerging in the new week. Bonds did a good job navigating the volatility surrounding Huang's return as NVDA CEO, but it should be noted that the NASDAQ is just barely above the early Nov lows, even after today's big stock market rally. If you'd bet that today's news helps put a floor under recent stock losses, you are lock-biased. If, instead, you view today's news as something that slows the bleeding in the AI sector but won't prevent a deeper correction, you would be more risk-tolerant in terms of locking/floating. Additionally, keep the nature of Thanksgiving week in mind. There can be random volatility that has nothing to do with underlying news or cues from other markets.

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Technicals/Trends in 10yr (why 10yr)

- Ceiling/Support (can be used as "lock triggers")
  - 5.27
  - 5.14
  - 5.07
  - 5.00
  - 4.93

- Floor/Resistance
  - 4.75
  - 4.82
  - 4.88

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%	-0.007%
2 YR	4.684%	+0.042%
30 YR	5.301%	-0.032%
5 YR	4.749%	+0.016%

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