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## [Municipal Bond Opportunities Amid a Cooling Housing Market.](#)

### **Overview**

- U.S. housing market cooling drives investors toward municipal bonds and securitized credit for capital preservation amid high mortgage rates and shifting supply dynamics.
- Multifamily sectors gain traction due to 94.5% occupancy, stable cash flows, and conservative leverage, contrasting with residential market challenges.
- Tightened underwriting and CMBS/CLO innovations enhance risk alignment, while OBBBA tax advantages boost demand for high-tax state munis.
- Strategic credit selection and 3-5 year duration positioning optimize yield-risk balance as rate cuts loom in H2 2025.

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