Financial Sector Advisory Council

Federal Reserve Bank of Dallas

Agenda

November 17, 2026

2:00 p.m.	*15 min*	Welcome by Lorie Logan, Seth Searls, and Hayley Boesky
2:15 p.m.	*90 min*	Group discussion to begin with selected Council members sharing their views on the following topics:

- What are the primary drivers of moves in U.S. and global sovereign bond yields this year? How do you expect fiscal and geopolitical developments to affect global sovereign bond markets going forward? How do you see recent dynamics impacting broader financial markets as well as the U.S. economic and policy outlook?

- How have recent credit market dynamics affected your assessment of financial conditions? What is your outlook for credit markets, including investor demand, especially for AI-related issuance? What are the most salient risks to your outlook?

3:45 p.m.	*15 min*	Break
4:00 p.m.	*50 min*	Group discussion on the following topic:

- What other risks in the financial system and markets are you focused on that we have not discussed today?

4:50 p.m.	*10 min*	Closing remarks by Lorie Logan, Seth Searls, and Hayley Boesky
5:00 p.m.		Adjourn