

From: Jeffery Edwards <jeevacation@gmail.com>
To: [REDACTED] <[REDACTED]>
Sent: 8/9/2008 2:44:25 PM
Subject: Re:

Jeffrey would bet that the election needs some republican ease up, they will do what it takes to give an impetus to a declining oil, and make liquidity abound. I think opportunity is huge, he sees no UNEXPECTED BAD NEWS, so with the inherent uncertainty, it can only be better than expected, no one is going to say, "OH I didn't realize it could be this bad. Therefore look for cyclical bargains,, vegas, airlines, not freddie or fannie, but lehman now looks sound, big buyers in the mid twenties.

On 8/8/08 9:21 PM, "[REDACTED]" <[REDACTED]> wrote:

> The push/pull between oil/china weakness and the uncertainty about
> financials and the US home owner is twisting the market in weird ways. What
> force wins? How would you bet?
>
> Let me know when I can visit.
>
> Jes
>
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