

today or tomorrow lets speak

On Wed, Jan 29, 2014 at 4:19 AM, vsahni <vsahni@me.com> wrote:

don't like the entry points here, looked at all my sharpe ratios not great. there is a china trade which I like, needs to be managed and u also need to know the market a bit, trying to fine tune for u. Focus on USD EM bonds, trying to see if any really stand out. Also looking at a couple of interesting fund trades for u (being long a long/short equity fund w/an embedded put option -> this year is a year of stock selection and portable alpha)

On another note, we need to look at Japan closer. I like real assets there, as inflation is showing some signs of picking up and despite REITS rallying 60%+, physical real estate is cheap and easy to manage. I just bot an apartment in prime tokyo in December and net yields are very attractive. Asian investors are quite bullish and are looking to diversify away from expensive singapore and HK. Tokyo Olympics are 2020. When u have time lets discuss. Long real estate + a long USDJPY position (natural hedge).

On Jan 28, 2014, at 11:59 PM, Jeffrey Epstein wrote:

trade?

On Tue, Jan 28, 2014 at 5:24 PM, Vinit Sahni <vsahni@me.com> wrote:

TURKEY'S CENTRAL BANK RAISES OVERNIGHT LENDING RATE TO 12.00%  
- this is the key rate, and it was at 7.75% until now, so a  
4.25% increase, far greater than the 2.50% expected.  
TURKEY'S CENTRAL BANK RAISES BENCHMARK REPO RATE TO 10.00% -  
from 4.50%  
TURKEY'S CENTRAL BANK RAISES OVERNIGHT BORROWING RATE TO 8.00%  
from 3.50%  
TURKEY CENTRAL BANK RAISES LATE LIQUIDITY WINDOW RATE TO 15%

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Vinit

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