
From: Nav Gupta [REDACTED]
Sent: 2/3/2014 4:55:51 PM
To: Paul Morris [REDACTED]
CC: Tazia Smith [REDACTED]; Vinit Sahni [REDACTED]
Subject: Re: percentages get a read from your team [C]

Got it Paul. Thx

On 3 Feb 2014, at 21:45, "Paul Morris" <[REDACTED]> wrote:

Classification: Confidential

Watford Re looks like a new hedge fund with bermuda reinsurance wrapper started by Highbridge/Arch capital, don't know what type guess credit or long/short

i have not talked with him about energy renaissance but likely liquid equities across producers or secondary beneficiaries (e.g. auto, chemicals), JP has created a basket recently focused on this theme

Paul Morris
Managing Director
Deutsche Bank Private Bank
345 Park Avenue, 27th Floor
New York, NY 10154
Office [REDACTED]
Cell: [REDACTED]

Nav Gupta---02/03/2014 04:37:15 PM---What risk is in energy renaissance theme and Watford re. Thx

From: Nav Gupta/db/dbcom@DBEMEA
To: Tazia Smith/db/dbcom@dbamericas,
Cc: Vinit Sahni/db/dbcom@dbemea, Paul Morris/db/dbcom@dbamericas
Date: 02/03/2014 04:37 PM
Subject: Re: percentages get a read from your team [C]

What risk is in energy renaissance theme and Watford re.

Thx

On 3 Feb 2014, at 20:58, "Tazia Smith" <[REDACTED]> wrote:

Classification: Confidential

Sounds good. I'll send through our initial suggestions, Nav, and then you can opine on