

def to watch

From: Tazia Smith, [REDACTED]
To: Vinit Sahn [REDACTED], Nav Gupta, [REDACTED], Paul Morris,
Date: 04/02/2014 17:58
Subject: Fw: percentages get a read from your team [C]

Classification: Confidential

- Have some recommendations for modifications to the equity baskets (Healthcare, Financials, Europe, Japan)*
- Would like to see 5-10% in Tech in US -> take 5% from mortgages, possibly 2-5% from Europe and/or 2-5% from energy
- PO vs. IO in mortgages? 5% down from 10% (will speak with traders on existing plus opportunistic entry)
- Add the near-term short crude trade to the energy allocation, 2%

*details to follow. example 1:
(Embedded image moved to file: pic14796.gif)

----- Forwarded by Tazia Smith [REDACTED] on 02/04/2014 10:30 AM -----

From: Jeffrey Epstein <jeevacation@gmail.com>
To: Tazia Smith [REDACTED], Paul Morris [REDACTED],
Date: 02/02/2014 08:59 PM
Subject: percentages get a read from your team

Inline image 1

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