

Classification: Confidential

Good Morning Jeffrey - Just called to follow up on the below. Also, we do have your IMPAC rmbms working at 74 or better.

Be Back,  
Tazia

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----- Original Message -----

From: Tazia Smith

Sent: 03/07/2014 06:35 PM EST

To: jeevacation@gmail.com

Cc: [REDACTED]; Paul Morris; Vinit Sahni;

Nav Gupta; Vahe Stepanian

Subject: 5 US Liquid Stocks (GILD, HCA, CMCSA, FFIV, XOM) [C]

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Jeffrey -

Per your request, concentrating on 5 liquid, US equities we really like.  
Targeting Healthcare, Energy and Tech sectors:

Gilead (GILD)  
HCA holdings (HCA)  
Comcast (CMCSA)  
F5 Networks (FFIV)  
Exxon (XOM)

Put \$3mm in each, total \$15mm to work. More detail below.

Have a great weekend,  
Tazia

Gilead (GILD) - trades avg 10mm shs/day  
Biotech was beat-up today. There is a lot of market chatter on stretched valuations, especially on upcoming IPOs. Understand that you have a bullish outlook on the group. ADD to your Gilead (GILD). After today's trade, you're long 8.1k shares at \$78.90. DB price target \$132 (65% implied upside). Chart below, report from this week defending vs a voluntary recall (392k bottles only) attached.

GILD 1yr Price History  
(Embedded image moved to file: pic01576.gif)

[attachment "GILD - defend 3.6.14.pdf" deleted by Tazia Smith/db/dbcom]

HCA Holdings (HCA) - Trades avg 3mm shs/day