
From: Vinit Sahni [vinit.sahni@db.com]
Sent: 9/25/2014 11:35:29 AM
To: Paul Morris [paul.morris@db.com]
CC: Uzair Aqeel [uzair.aqeel@db.com]; Caroline Kitidis [caroline.kitidis@db.com]; Nav Gupta [nav.gupta@db.com]; Tazia Smith [tazia.smith@db.com]
Subject: Re: Key themes & trades

Market clearly starting to get more tactical we will see more relative movements.

Vinit

On 25 Sep 2014, at 16:29, Paul Morris <paul.morris@db.com> wrote:

thanks, let's try to get some folks engaged on these

Paul Morris
Managing Director
Deutsche Bank Private Bank
345 Park Avenue, 27th Floor
New York, NY 10154



Uzair Aqeel---09/25/2014 08:07:15 AM---Hi Tazia, Here are some trades we're thinking about that Nav suggested you may wish to highlight to

From: Uzair Aqeel/db/dbcom@DBEMEA
To: Tazia Smith/db/dbcom@DBAMERICAS,
Cc: Nav Gupta/db/dbcom@DBEMEA, Vinit Sahni/db/dbcom@DBEMEA, Paul Morris/db/dbcom@DBAMERICAS, Caroline Kitidis/db/dbcom@DBAMERICAS
Date: 09/25/2014 08:07 AM
Subject:Key themes & trades

Hi Tazia,

Here are some trades we're thinking about that Nav suggested you may wish to highlight to Jeffrey Epstein.

Key themes:

- Divergence in monetary policy between the Fed & Bank of England on the one hand and ECB & Bank of Japan on the other
- Continued capital inflows into Asian countries where financial conditions are easing (eg, Japan) and/or structural reforms are being implemented (eg, India)
- US recovery - buying into dips as US anchors global growth

EURUSD continues to break down -- if you're looking to reload: