

Subject: Fw: percentages get a read from your team [C]
From: Tazia Smith <[REDACTED]>
Date: Tue, 04 Feb 2014 12:58:26 -0500
To: Vinit Sahni <[REDACTED]>,
Nav Gupta <[REDACTED]>,
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- 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: pic25366.gif)

----- Forwarded by Tazia Smith/db/dbcom on 02/04/2014 10:30 AM -----

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

Inline image 1

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