

Subject: Re: percentages get a read from your team [C]
From: Vinit Sahni <[REDACTED]>
Date: Tue, 04 Feb 2014 13:28:53 -0500
To: Tazia Smith <[REDACTED]>
Cc: Nav Gupta <[REDACTED]>, Paul Morris <[REDACTED]>

Great thanks. Nav on it. Also would like some of the USD prices on IO's as when prepays pickup they naturally cheapen up. Some of the energy stocks have clearly cheapened up. financials, the likes of citi have cheapened up nicely ? Tech makes sense - they did lose value last few days especially amaz on. Another sector that got killed was Potash, the likes of Mosaic. People also looking at staples.

Vinit

On 4 Feb 2014, at 17:58, "Tazia Smith" <[REDACTED]> wrote:

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:
<0.31E.gif>

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

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

<0.58D4.png>

The information contained in this communication is confidential, may be attorney-client privileged, may constitute inside information, and is intended only for the use of the addressee. It is the property of Jeffrey Epstein
Unauthorized use, disclosure or copying of this communication or any part thereof is strictly prohibited and may be unlawful. If you have received this communication in error, please notify us immediately by return e-mail or by e-mail to jeevacation@gmail.com, and destroy this communication and all copies thereof, including all attachments. copyright -all rights reserved