

Subject: Re: Jeffrey - Payrolls [C]
From: Tazia Smith <[REDACTED]>
Date: Mon, 05 May 2014 05:36:09 -0400
To: Vinit Sahni <[REDACTED]>,
Paul Morris <[REDACTED]>,
Nav Gupta <[REDACTED]>,
Vahe Stepanian <[REDACTED]>

Classification: Confidential

Tx

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Tazia Smith
Director
Key Client Partners - US

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Deutsche Asset & Wealth Management
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New York, NY 10154

[REDACTED]
E-mail: [REDACTED]

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

From: Vinit Sahni
Sent: 05/02/2014 04:34 PM GDT
To: Paul Morris; Tazia Smith; Nav Gupta
Subject: Fw: Jeffrey - Payrolls [C]

Classification: Confidential

fyi

Best
Vinit

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Vinit Sahni
Managing Director | Global Head - Professional Client Group & Key Client
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EFTA01468704

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----- Forwarded by Vinit Sahni/db/dbcom on 02/05/2014 16:33 -----

From: "jeffrey E."
<jeevacation@gmail.com>

To: Vinit Sahni/db/-
dbcom@DBEMEA,

Date: 02/05/2014
13:58

Subject: Re: Jeffrey - Payrolls
[C]

monday

EFTA01468705

On Fri, May 2, 2014 at 2:53 PM, Vinit Sahni <[REDACTED]> wrote:
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Jeffrey - strong payrolls, positioning was short into the number, reaction could have been more violent. Confirms view that US growth is strong and this could be the start of the market buying the fact that we will see a strong US recovery. Brings us back to US equity growth baskets, US rates higher especially 5s and possibly 5y5y, Equity over credit as volatility picks up...we are now going back to the drawing board and will look for ideas this weekend.

if u have 2 mins Nav and I can get on the phone with u

Best
Vinit

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