

From: Peter Thiel [REDACTED]
To: jeffrey E. <jeevacation@gmail.com>
Subject: Re:
Sent: Friday, May 1, 2015 12:34:48 AM

Negative-yielding notes, etc seem like a sign of something really crazy...

No conviction on oil but agree that risks remain to the upside on price -- Saudi appointment of bin Nayef seems like a big deal, suggesting they are really scared.

On Apr 30, 2015, at 2:18 PM, jeffrey E. <jeevacation@gmail.com<mailto:jeevacation@gmail.com>> wrote:

option pricing totally out of whack, , eurobonds soon the all time great short. unlikely to break zero. so asymmetric risk reward . keep an eye on saudi and attitude towards keeping oil low . young generation not happy with that idea

--

please note

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 JEE

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<mailto:jeevacation@gmail.com>, and destroy this communication and all copies thereof, including all attachments. copyright -all rights reserved