From: [redacted]
Sent: Thursday, October 31, 2013 1:47 PM
To: jeevacation@gmail.com
Subject: Re: FB down despite solid earnings, ARIA down 50%, EURUSD down ~1.365 [C]

Classification: Confidential

FB rallied back to $49, hasn't held yet but stock's all over. ~$48.50 now.

work Jan 60s or 62.50s at a limit?

Dec 57.50 ~$0.75
Dec 60 ~$0.50
Jan 57.50 ~$1.24
Jan 60 ~$0.90
Jan 62.50 ~$0.64

source: bloomberg 10/31/13

[redacted]

From: Jeffrey Epstein <jeevacation@gmail.com>
To: [redacted]
Date: 10/31/2013 09:31 AM
Subject: Re: FB down despite solid earnings, ARIA down 50%, EURUSD down ~1.365 [C]

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yes to fb calls but lets not get called away. . no

On Thu, Oct 31, 2013 at 9:25 AM, [redacted]> wrote:
Classification: Confidential

Good Morning Jeffrey -

EURUSD sold off on the FOMC announcement (or rather absence thereof ?). Thoughts on a knock-in? Indicative levels from DB FX: a 6mo 1.3650 Vanilla Euro put costs ~ $30k per Euro 1mm. vs the 6mo 1.3650 Euro Put with a KI at 1.3900 costs ~$13k per Euro 1mm. (indicative levels only, subject to market movement)

ARIA - down 50% (~$2.30 in pre) on reports that the co is discontinuing Iclusig marketing in the US

FB - ~$46.66 (down 4.5%) posted solid Q3 EPS of $0.25 vs. $0.19 cons. Stock was volatile in the aftermarket, dropping ~15% after the CFO suggested ads-per-user growth was tapped out. Shares recovered to ~$49 in the pre this morning as bulls point to pricing and continued successful mobile growth as the forward earnings drivers. DB's analyst remains positive but suggests FB mgmt removed the "dream scenario" that he thought would continue for a couple more years. (DB = Buy, $61tgt).

Recall, you own 17.5k shares of FB. Dec calls?

Speak with you soon,
[redacted]

Source: Bloomberg, Streetaccount, DB Global Markets Research 10/31/13
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<https://ger.gm.cib.intranet.db.com/ger/document/pdf/0900b8c08775b75e.pdf>

[redacted]

[redacted]

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Jeffrey Epstein
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