
From: Gianni Serazzi <[REDACTED]>
Sent: Tuesday, May 2, 2017 10:03 AM
To: jeffrey E.
Subject: Re: Market...

We can talk about it if you want.

[REDACTED]
Thx<=div>
G

On May 2, 2017 11:44 AM, "jeffrey E." <jeevacation@gmail.com> wrote:

investme=nt ?

[REDACTED]

Ciao Je=f,
I hope all is great. Let me know if you get to Monaco anytime soon!=In the meantime if useful
-Luxury companies continue to grow, Ch=na mainland is 8 months that is growing aggressively. EM in general and As=a great, EU and US OK. US slowing in April
-Have a cool investme=t if you want to talk about it. Sizeable (~100M), cannot do by myself
-Tech getting expensive. Several friends are trying to hedge their po=itions and they work in these companies. Big internal pressure not to sell=their stock (bonus cut etc)
-Tesla stock cannot be explained by =eople that work in Tesla... Managers getting upset with Elon's big ann=uncements on timing etc when they are not approved internally

Thx
G

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please note

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