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Subject:

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Yes in the power point we highlight 5 activist positions but the portfolio will include upto 20 names which we feel have at least 5X upside. In the 5 the tech co is +45 , the 600mm asset co is +40. The Billion dollar alt energy co is flat. The micro cap cloud co is flat and the 5 bn transport co is -45. On average +5-8 percent. I expect 5 percent per mos returns. Bruce.