

From: Gianni Serazzi <[REDACTED]>
To: "jeffrey E." <jeevacation@gmail.com>
Subject: Re: Yearly tests guide
Date: Mon, 04 May 2015 12:36:12 +0000

All good here, busy as usual but all good.

Getting ready for the Monaco move, in the meantime too much work (story of our lives)

HK and Macao with big problems across all luxury segments with the exception of Hermes, main reason is visas blocked for mainland chinese (retaliation for demonstrations and anti-corruption law)

US marching along, Europe stuck in first gear for structural reasons, Japan growing well after too many years of stagnation

All friends in Hedge Funds surprised by how much resilience is in the markets propped up by excess liquidity.

All scared of overall valuation of stocks, high-yield bond and government bonds (especially Europe). I pushed 40% of portfolio (as some of them did) into alternatives (Oil Greece and Russia) and is paying off, starting now to take also a few short positions

I am 1-2M short in closing the deal for Fashion. Bringing it globally is a big opportunity to create a 100M+ company with 10-15% ebitda margin.

Hope to see you soon, enjoy life in the meantime you who can :)

Best
G

On Mon, May 4, 2015 at 12:56 PM, jeffrey E. <jeevacation@gmail.com> wrote:
thanks that is kind, and yes i already do it.. how are you and what are you seeing

On Mon, May 4, 2015 at 4:09 AM, Gianni Serazzi <[REDACTED]> wrote:

Ciao Jeff,

I am sure that there are many doctors following you, however I wanted to share 2 lines of all that I have learned in the last 4 years where I had to focus on health (luckily all is good)

1-Every year do an MRI with and without contrast on one of the new "open" machines of upper and lower abdomen and head. No harm as they are only magnetic field. Make sure you do them always in the same clinic as they can put the new ones next to the previous ones and they can get something bad while it's still a few millimeters. For the head they can detect Alzheimer several years before symptoms and the new drugs slow or block the disease (for example <http://www.medicalnewstoday.com/articles/293269.php>)

2-Once a year chest X ray

3-Once a year blood tests with all cancer markers (drawing a large amount of blood once a year is also useful as it reactivates the stem cells to produce more blood)

Sorry to disturb you but after what I had to endure I promised myself to always break the balls of my friends on this

One morning a year to do these exams can add more years of life than 2 hours of sport a day or avoiding meat (I do all but at least the tests please force yourself)

Thx
G

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JEE

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