From: Paul Barrett <psbnyc99@gmail.com>
To: "jeffrey E." <jeevacation@gmail.com>
Subject: Re: Euro
Date: Wed, 12 Jul 2017 13:18:32 +0000

Our 2019 divi forecast is at 127 which is about 7 points of upside for 2 years. Prefer European Banks given the rate outlook.

I also like Japan. DXJ is the hedged ETF. That's my preferred etf to use. Technically looks very good.

Lastly I want to own new China for 1-2 years:
BABA
TENCENT
JD
NTES

Would like to build a $5mm position in total. I think the trends are so powerful and so secular with these 4 companies dominating their respective space.

Let me know and I can implement with Rich.

Paul

Paul Barrett
646 342 6930

On Jul 12, 2017, at 5:13 AM, jeffrey E. <jeevacation@gmail.com> wrote:

lets think about getting long europe. . divd xx. maybe japan. , how woudl you play a short s and p for a week. ? TODAY

On Tue, Jul 11, 2017 at 9:16 PM, Paul Barrett <psbnyc99@gmail.com> wrote:

> Jeffrey
>
> As we discussed a few months ago I think the euro could trade up to 1.2000 in the coming 3-4 months. The ECB will move towards tightening mode (slowly but enough to trigger flows out of the US into Europe) by Q4. I think we should get outright long or buy some 1.1750 calls.
>
> Rich - can we buy euro calls with anyone?
>
> Paul Barrett
> 646 342 6930

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