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Subject: Update
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Jeffrey

We unwound EURHUF and bought 3MM of BP (at 42.37, up \$1 today)

Still like the long term internet mobility theme....AAPL QCOM AMT. We should have exposure to these names.

Also with QE2 in play through June our strategists like MXN, CLP and KRW vs the USD. Would do 2.5MM in each.

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