

From: "[REDACTED]" on behalf of Landon Thomas <[REDACTED]>

To: Jeffrey Epstein <jeevacation@gmail.com>

Subject: Re:

Date: Fri, 03 Sep 2010 17:07:09 +0000

just got off phone with milken's lead economist who was saying that IT non defense related investment growing at 24 percent rate this year for corporates which is unprecedented.

have not yet talked to milken -- but this guy says that milken subscribes to the view, and that you do not really need to see a huge jobs recovery to drive the recovery.

So I guess my next question is this: assuming this holds true and you have this segment of mid to large cap cos that borrow cheap invest smart export overseas and do not feel the need to hire under qualified us workers -- how do you play this theme.

do you buy say a cisco or a 3mm or an apple or some such?

do you buy the broad S&P index?

How do you make the most money on this trade???

I am still not so sure how I am going to write this story as I kind of need an international angle -- perhaps if there is one company that would seem to illustrate all these themes coming to together that is based overseas, that might help.

But I return to the key question: if you believe in the above how doe you position yourself to make money on it coming true

On Fri, Sep 3, 2010 at 12:52 PM, Jeffrey Epstein <jeevacation@gmail.com> wrote:

did you reach jes or milken?

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Landon Thomas, Jr.
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