

From: "[REDACTED]" <[REDACTED]>
To: jeffrey E. <jeevacation@gmail.com>
Subject: Re:
Date: Tue, 21 Jun 2016 18:33:45 +0000

Yes agree with you. Unless he goes through a full capital increase like The BNS is asking
But a killer for all

Ariane de Rothschild

On 21 Jun 2016, at 17:25, jeffrey E. <jeevacation@gmail.com> wrote:

strategy yes, interpersonal - dont think so. . cant do a stock deal with them under any circumstances for quite a while. the shares trade only approx 3m shares per day. you would own a full month or more of total trading volume. high volatility so it would take you 60 days or more to get out. . trying a secondary with the stock in the toilet after he raised money at 20 . you would not be first in line.... it also looks like they will need a great deal more of capital. we should explore plan b,c,and d

On Tue, Jun 21, 2016 at 10:57 AM, [REDACTED] <[REDACTED]> wrote:

Haha i hope that!!

For Tidjane, yes agree with you, although board will be in a very difficult position as well as they are officially in line with his strategy

Ariane de Rothschild

On 21 Jun 2016, at 16:19, jeffrey E. <jeevacation@gmail.com> wrote:

he is certainly closer to mom -like than me. . I think if the credit suisse breaks 10 on the downside , tidjeane is gone.

On Tue, Jun 21, 2016 at 10:18 AM, [REDACTED] <[REDACTED]> wrote:

Thank you - very kind. Azzedine has prepared the room and is happy to play my mom. But thk you very much

Ariane de Rothschild

On 21 Jun 2016, at 16:15, jeffrey E. <jeevacation@gmail.com> wrote:

you are also welcome to my apt. valdson is there it would be private. no one the wiser

On Tue, Jun 21, 2016 at 10:10 AM, [REDACTED] <[REDACTED]> wrote:

Did you see their scandal in Brasil?

Ariane de Rothschild

On 21 Jun 2016, at 16:02, jeffrey E. <jeevacation@gmail.com> wrote:

<http://www.nytimes.com/2016/06/21/business/dealbook/credit-suisse-chief-contentends-with-growing-tensions-and-a-sinking-stock.html?hpw&rref=business&action=click&pgtype=Homepage&module=well-region®ion=bottom-well&WT.nav=bottom-well>

On Tue, Jun 21, 2016 at 9:48 AM, [REDACTED] <[REDACTED]> wrote:

Both places ice cold

B in Paris and a disaster, so much so that i will stay at Azzedine s place tomorrow - tired of handling him

Had lunch with Tom Kalaris 2 days ago . Super smart man . He asked the only really interesting question : are you bored in this job ? Loved it

Ariane de Rothschild

On 21 Jun 2016, at 11:57, jeffrey E. <jeevacation@gmail.com> wrote:

cold in paris or geneve?. . hows B . better or worse?

On Tue, Jun 21, 2016 at 5:45 AM, [REDACTED] <[REDACTED]> wrote:

Nothing from Rockefeller (and no surprise there - total waiste of time)

The weather is totally impossible- hate the cold

Ariane de Rothschild

On 21 Jun 2016, at 11:39, jeffrey E. <jeevacation@gmail.com> wrote:

hope you get some rest. . not likely i guess. . did goldman come with valuatiiion? . any more from rockefeller.?

On Tue, Jun 21, 2016 at 1:45 AM, [REDACTED] <[REDACTED]> wrote:

Sorry . I think i caught the flue .

In the near future, downsize and sell on tops(volatility, spreads, etc)

Medium term: weak growth prospects- buy disruptive tech,

Focus on trends that will reshape the world (including migration flows)

Long term : buy land and grow crops and become wise

Ariane de Rothschild

On 20 Jun 2016, at 12:00, jeffrey E. <jeevacation@gmail.com> wrote:

the silcon valley boys will be here today , to discuss how to make money in the future. any ideas that you would like to bounce off them?

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