

From: Peter Thiel <[REDACTED]>
To: jeffrey E. <jeevacation@gmail.com>
Subject: Re:
Date: Fri, 01 May 2015 00:34:48 +0000

Negative-yielding notes, etc seem like a sign of something really crazy...

No conviction on oil but agree that risks remain to the upside on price -- Saudi appointment of bin Nayef seems like a big deal, suggesting they are really scared.

On Apr 30, 2015, at 2:18 PM, jeffrey E. <jeevacation@gmail.com<mailto:jeevacation@gmail.com>> wrote:

option pricing totally out of whack, , eurobonds soon the all time great short. unlikely to break zero. so asymmetric risk reward . keep an eye on saudi and attitude towards keeping oil low . young generation not happy with that idea

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please note

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