

From: Paul Barrett <[REDACTED]>

To: jeffrey E. <jeevacation@gmail.com>

Subject: RE: Re:

Date: Fri, 02 Mar 2018 16:59:58 +0000

Inline-Images: image002.jpg; image003.jpg

Let's discuss the USD and U.S credit.

Foreigners were huge buyers of US IG credit because they could hedge out the FX and still make a lot more than what their local bonds were paying. Not anymore. Could result in a huge drop in demand for US credit. Therefore buying credit protection on CDX IG is something I am looking at.

Paul Barrett

Alpha Group Capital LLC

[REDACTED]
[REDACTED] (o) [REDACTED] (c)



From: jeffrey E. [mailto:jeevacation@gmail.com]

Sent: Friday, March 02, 2018 11:46 AM

To: Paul Barrett <[REDACTED]>

Subject: Re: Re:

no, we might do covered calls. for ex. .

On Fri, Mar 2, 2018 at 11:45 AM, Paul Barrett <[REDACTED]> wrote:

You want to buy vol at these levels?

Paul Barrett

Alpha Group Capital LLC

[REDACTED]
[REDACTED] (o) [REDACTED] (c)



From: jeffrey E. [mailto:jeevacation@gmail.com]

Sent: Friday, March 02, 2018 11:44 AM

To: Paul Barrett <[REDACTED]>; Richard Kahn <[REDACTED]>

Subject: Re:

i never like selling puts. it is a sucker play, limited upside with unlimited down.

On Fri, Mar 2, 2018 at 11:42 AM, Paul Barrett <[REDACTED]> wrote:

You have 2 mins?

I am pricing:

Buying 260/250 SPY put spreads 1/1.5x – cashless.

Selling puts on Raytheon, GD, Lockheed and Northrop

Paul Barrett

Alpha Group Capital LLC

[REDACTED]

[REDACTED] (o) [REDACTED] (c)

[REDACTED]



From: jeffrey E. [mailto:jeevacation@gmail.com]

Sent: Friday, March 02, 2018 11:39 AM

To: Paul Barrett <[REDACTED]>; Richard Kahn <[REDACTED]>

Subject:

we should start looking at options market , premiums getting high

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