

**From:** "jeffrey E." <jeevacation@gmail.com>

**To:** Paul Barrett <[REDACTED]>

**Subject:** Re: Re:

**Date:** Fri, 02 Mar 2018 17:00:33 +0000

**Inline-Images:** image003.jpg; image002.jpg

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free in 1 hr

On Fri, Mar 2, 2018 at 11:59 AM, Paul Barrett <[REDACTED]> wrote:

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)

[REDACTED]



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

[REDACTED]



**From:** jeffrey E. [mailto:[jeevacation@gmail.com](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](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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please note

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