

**From:** "jeffrey E." <jeevacation@gmail.com>  
**To:** Jonathan Farkas <[REDACTED]>  
**Subject:** Re: Cliff's Quarterly Investor Letter - Oct. 2017  
**Date:** Tue, 20 Feb 2018 13:50:40 +0000

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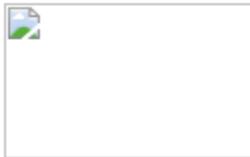
love to

On Tue, Feb 20, 2018 at 8:45 AM, Jonathan Farkas <[REDACTED]> wrote:

jeffrey this guy is brilliant have known him for 10 years lost his last rept but up 28 percent for year very methodical he held herbalife down 10 points same for uri because he doesnt buy anything he does not study for 6 months his name is Cliff Sosin .Dan Lufkin is ian investor he just picked up some MIT money .You should have a talk with him when you come up next he can make up for some of my ideas haha best and be well you are a great person and i am blessed you are my friend Jonathan

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From: [REDACTED]  
To: [REDACTED]  
Sent: 10/12/2017 4:02:54 PM Eastern Standard Time  
Subject: Cliff's Quarterly Investor Letter - Oct. 2017



Below please find a link to the October 2017 CAS Investment Partners quarterly letter, which I am sending to you for your information as we have discussed the fund from time to time.

[CAS Investment Partners October 2017 Investor Letter](#)

I look forward to your thoughts, comments and questions.

Sincerely,  
Cliff

Clifford Sosin  
**CAS Investment Partners, LLC**



CAS Investment Partners, LLC



[REDACTED]

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