

From: "jeffrey E." <jeevacation@gmail.com>
To: Paul Barrett <[REDACTED]>
Subject: Re: FMI/other
Date: Tue, 19 Jun 2018 15:59:08 +0000

Your job was to analyze pros cons

On Tue, Jun 19, 2018 at 11:51 AM Paul Barrett <[REDACTED]> wrote:
Jeffrey

Roche agreed to buy FMI for \$137/share in cash.

Currently it is trading at \$136.50. Let me know what you would like to do.

I am very sorry for not checking with you prior to selling part of the position.

As a follow up to our meeting last night I will come back with an action item on all the remaining equity positions. If my report card is going to be based on the \$9mm then I would rather liquidate everything else unless you specifically wanted to keep certain positions.

I would continue to manager the fixed income portfolio as I am currently doing.

Paul

Paul Barrett
Alpha Group Capital LLC
142 W 57th Street, 11th Floor, New York, NY 10019
[REDACTED] (o) [REDACTED] (c)
[REDACTED]

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please note

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JEE

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