

From: "Ens, Amanda" <[REDACTED]>

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Subject: 1:1 meeting with our head of European and cross asset strategy next Thursday/Friday?

Date: Tue, 06 Dec 2016 15:52:52 +0000

Attachments: Global_Cross_Asset_Strategy_-_Year_Ahead_-_The_Trump_inflection.pdf;
European_Equity_Strategy_-_2017_year_ahead_-_Refining_the_reflation_rotation.pdf

Jeffrey,

Our European and cross asset strategist is visiting NY from London next Thursday and Friday. Would you like a 1-on-1 meeting if you're in town? I've attached his latest reports.

Bio: James Barty joined the bank in March 2015 as Managing Director and head of European Equity Strategy. Previously he was a Principal and head of Macro Strategy at Arrowgrass Capital Partners LLP; head of Global Equity Strategy and Asset Allocation at Deutsche Bank; and head of European Equity Strategy and co-head of Global Economics, both at Deutsche Bank. He has a master's in economics from Warwick University and an MA in philosophy, politics and economics from Oxford University.

Current themes include

- Important themes to hedge
- Update on multi asset, longer-term portfolio of ideas
- Does the pro-cyclical/reflationary trade still have legs through 2017?
- How high can yields go?
- Will Europe be left out of the inflation party?
- What does the de-dollarisation of the world mean for different regions/asset classes?
- Thematic trades in equities, rates, FX and credit for 2017
- Global, cross asset, investor positioning and sentiment
- There is USD1trn of multi asset AuM in Europe, what are these clients thinking?

Regards,
Amanda

Amanda Ens

Director | Global Equities
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