

From: Tazia Smith <[REDACTED]>
To: jeevacation@gmail.com
Cc: Nav Gupta <[REDACTED]>, Paul Morris <[REDACTED]>, [REDACTED], Vahe Stepanian <[REDACTED]>, Vinit Sahn <[REDACTED]>
Subject: Re: Biotech Update... note bounce in Foundation Medicine on withdrawal of prior secondary offering [C]
Date: Wed, 16 Apr 2014 15:45:54 +0000
Inline-Images: unnamed; unnamed(1); unnamed(2); unnamed(3); unnamed(4); unnamed(5); unnamed(6); unnamed(7); unnamed(8)

Classification: Confidential

Jeffrey -

Uptick in Biotech today ahead of earnings for the big caps (biogen, gilead, celgene) next week. Your positions below with P/L. Please note that your Foundation Medicine has really bounced off it's recent lows of \$~\$24 (chart below); yesterday the company withdrew a prior filing for a \$150mm secondary offering. We break out Ariad because it is more M&A driven at this point than sector beta.

As of 4/16/14 11:23 pm			PX_LAST				
Description	Trade Date	Quantity	Current Price	Unit Cost	Market Value	Current Total Cost	Unrealized G/L
SANGAMO BIOSCIENCES	5/28/2013	50,000.00	\$ 14.12	\$ 8.44	\$ 706,000.00	422,214.00	\$ 283,786.00
BIOGEN	2/14/2012	2,095.00	\$ 290.72	\$ 119.55	\$ 609,058.40	250,454.95	\$ 358,603.45
FOUNDATION MEDICINE	1/13/2014	25,000.00	\$ 27.27	\$ 27.51	\$ 681,625.00	687,663.50	\$ (6,038.50)
GILEAD SCIENCES INC	Multiple	8,100.00	\$ 69.31	\$ 79.41	\$ 561,402.90	643,204.00	\$ (81,801.10)
				Total Biotech	\$ 2,558,086.30	\$ 2,003,536.45	\$ 554,549.85
ARIAD PHARMACEUTICALS	Multiple	16,535.00	\$ 6.83	\$ 17.60	\$ 112,934.05	290,997.40	\$ (178,063.35)



From: Tazia Smith/dbvdbcom
To: jeevacation@gmail.com,
Cc: Paul Morris, Vahe S [REDACTED], Nav [REDACTED], Vinit Sahn [REDACTED], [REDACTED]
Date: 04/02/2014 03:42 PM
Subject: Biotech Update... [C]

Classification: Confidential

Jeffrey -

Biotech forming a base to some extent (strong market backdrop, clearly) - you're up \$906k on your basket excluding the Ariad (outlier due to [REDACTED] prospects vs. group drivers) 1-mo price history charts below.

Description	Trade Date	Quantity	Current Price	Unit Cost	Market Value	Current Total Cost	Unrealized G/L
SANGAMO BIOSCIENCES	5/28/2013	50,000.00	\$ 17.51	\$ 8.44	\$ 875,500.00	422,214.00	\$ 453,286.00
BIOGEN	2/14/2012	2,095.00	\$ 308.71	\$ 119.55	\$ 646,747.45	250,454.95	\$ 396,292.50
FOUNDATION MEDICINE	1/13/2014	25,000.00	\$ 31.62	\$ 27.51	\$ 790,500.00	687,663.50	\$ 102,836.50
GILEAD SCIENCES INC	Multiple	8,100.00	\$ 73.79	\$ 79.41	\$ 597,699.00	643,204.00	\$ (45,505.00)
				Total Biotech	\$ 3,043,139.83	\$ 2,294,533.85	\$ 906,910.00
ARIAD PHARMACEUTICALS	Multiple	16,535.00	\$ 8.03	\$ 17.60	\$ 132,693.38	290,997.40	\$ (158,304.03)

SGMO 1mo Price History



BIIB 1mo Price History



GILD 1mo Price History



FMI 1mo Price History



Tazia Smith
 Director | Key Client Partners - US

DB Securities Inc
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Passion to Perform

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