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**From:** Paul Barrett <[REDACTED]  
**Sent:** Monday, July 24, 2017 5:56 PM  
**To:** Richard Kahn  
**Cc:** Jeffrey Epstein  
**Subject:** To Do

Rich

I would like to clean up the following positions:

Sell Akorn – they were bought for cash and makes no sense to hold from here

Sell GE – the company could take years to turnaround and I fear it will become another IBM.

Our GM position is way too big. I don't like any of the OEMs. Ride sharing and lower mileage car ownership will be a serious headwind for all of these car producers. I would gladly rotate the entire GM exposure to the Driver Assistance Theme.

Sell Match – position very small

<= class=MsoNormal>Sell MobilEye – INTC bought them and I hate Intel

Sell Square – position too small

Sell Terraform Global – position too small

Sell Global Partner Acquisition Corp

The next generation of cars and smartphones are going to have 3D sensors (think Iris scan vs fingerprint scan). So we should \$2.5MM from the proceeds of the above sales and buy \$500,000 of each of the following:

- \* Win Semiconductor
- \* ST Micro
- \* AMS AG
- \* Sunny Optics
- \* ASML

And lastly we need more eGaming exposure. We have Tencent and NetEase – both of which we will add on the next opportunity. So I would like to add \$500,000 each to:

\*       Ubisoft  
\*       Modern Times

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Paul

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