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**From:** Paul Barrett <[REDACTED]>  
**Sent:** Wednesday, July 12, 2017 1:19 PM  
**To:** jeffrey E.  
**Subject:** Re: Euro

Our 2019 divi forecast is at 127 which is about 7 points of upside for 2 years. Prefer European Banks given the rate outlook.

I also like Japan. DXJ is the hedged ETF. That's my preferred etf to use. Technically looks very good.

Lastly I want to own net China for 1-2 years:

BABA

TENCENT

JD

=div id="AppleMailSignature">NTES

=/div>

Would like to build a \$5mm position in total. I think the trends are so powerful and so secular with these 4 companies dominating their respective space.

Let me know and I can implement with Rich.

Paul

Paul Barrett  
[REDACTED]

<=r>On Jul 12, 2017, at 5:13 AM, jeffrey E. <jeevacation@gmail.com <mailto:jeevacation@gmail.com> > wrote:

lets think about getting long europe. .&nb=p; divd xx. maybe japan. , how would you play a short s and p for a week. ? TODAY

=div class="gmail\_extra">

On Tue, Jul 11, 2017 at 9:16 PM, Paul Barrett <[REDACTED]> > wrote:  
Jeffrey

As we discussed a few months ago I think the euro could trade up to 1.2000 in the coming 3-4 months. The ECB will move towards tightening mode (slowly but enough to trigger flows out of the US into Europe) by Q4. I think we should get outright long or buy some 1.1750 calls.

Rich - can we buy euro calls with anyone?

Paul Barrett  
[REDACTED]

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= please note

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