

To: Epstein, Jeffrey[jeevacation@gmail.com]
From: [REDACTED] on behalf of Landon Thomas [REDACTED]
Sent: Thur 9/2/2010 10:16:48 AM
Subject: Milken Institute report

This is interesting -- a very counter intuitive report by Milken Institute's chief economist Ross Devol arguing that there will be a corporate recovery driven by massive tech expenditure (hence your look how many computers I have been buying remark) and feeding of overseas markets.

Just what you were telling me...

http://www.milkeninstitute.org/pdf/From_recession_to_recovery.pdf

--
Landon Thomas, Jr.
Financial Correspondent
New York Times
Office phone: [REDACTED]
Mobile: [REDACTED]