
From: Shahzad Shahbaz <[REDACTED]>
Sent: Sunday, September 11, 2016 10:01 AM
To: jeffrey E.
Subject: Re:

Didn't realize this got left in my inbox.

For whatever it is worth from 2 months ago;

- Currencies; would short Euro and Sterling against Dollar
- Commodities; bullish on oil. Should hit \$ 60 by year end.
- Equities; generally very cautious except European Banks, US Banks and Selected Emerging Market names.
- Fixed Income; very cautious. Risk/reward trade off very skewed
- Real Estate; quite cautious unless meets our return hurdles which is minimum 5%. More emphasis on mezz debt with conservative LTV ratios.
- Other; generally more focused on structured transactions offering current cash pay with downside protection and some equity upside.

Current views not very different from above.

On Jun 27, 2016, at 12:14, jeffrey E. <jeevacation@gmail.com <mailto:jeevacation@gmail.com>> wrote:

ok. what is your view of the markets here. = ? currency? realestate?

On Mon, Jun 27, 2016 at 7:13 AM, Shahzad Shahbaz <[REDACTED]>
<mailto:[REDACTED]> wrote:

I think JV will be difficult as we would rather not be in a non contro= situation and too many other complications to deal with.

On Jun 27, 2016, at 13:54, jeffrey E. <jeevacation@gmail.com <mailto:jeevacation@gmail.com>> wrote:

understood. or should we begin in some sort of joint venture. ?

On Mon, Jun 27, 2016 at 3:36 AM, Shahzad Shahbaz= <[REDACTED]>
<mailto:[REDACTED]> wrote:

We could look at it as long as Rothschild is willing to meet our price expectations.

On Jun 26, 2016, at 19:19, jeffrey E. <jeevacation@gmail.com>
<mailto:jeevacation@gmail.com> wrote:

wondering with the eventual move to lux of banks, is there anything to
be done with KBL and rothschild

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