
From: jeffrey E. <jeevacation@gmail.com>
Sent: Friday, May 1, 2015 1:09 AM
To: Peter Thiel
Subject: Re:

the old guard is totally out. like the good old days= former crown prince now the equivalent of a doorman,
am=assador bandar in exile. fun stuff

On Thu, Apr 30, 2015 at 8:34 PM, Peter Thiel <mailto:[REDACTED]> wrote:

Negative-yielding notes, etc seem like a sign of something =eally crazy...

No conviction on oil but agree that risks remain to the upside on price -- =audi appointment of bin Nayef seems like a big deal, suggesting they are r=ally scared.

On Apr 30, 2015, at 2:18 PM, jeffrey E. <jeevacation@gmail.com <mailto:jeevacation@g=ail.com>
<mailto:jeevacation@gmail.com <mailto:jeevacation=gmail.com> >> wrote:

option pricing totally out of whack, , eurobonds so=n the all time great short. unlikely to break zero. so
=symmetric risk reward . keep an eye on saudi =A0 and attitude towards keeping oil low . young g=neration not
happy with that idea

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