
From: jeffrey E. <jeevacation@gmail.com>
Sent: Thursday, September 18, 2014 6:03 PM
To: A. de Rothschild
Subject: Re:

with my proposed structure, what is your downside. =C2 your shareholder position does not really give you leverage re brand=. in fact may complicate it

<=iv class="gmail_quote">On Thu, Sep 18, 2014 at 1:56 PM, A. de Rothschild=<mailto:[REDACTED]> wrote:

B4 i need them to give in on the brands .

Yv=s spoke to Kathy . He was fuming against Pillsbury and wants to stop using=them

Sent from my iPhone

On 18 sept. 2014, at 1:=09, "jeffrey E." <jeevacation@gmail.com <mailto:jeevacation@gmail.com> > wrote:

yes, I've gone through all the=r numbers and have spoken to friends.

i see no=problem for you, and in fact if i were to sell them your stock i wou=l make it at a price that reflected the movement over the next two years.=C2 (the term of the new directors.) so see the 5.3 million shar=s at the hightest 5 day average over the next two years. 17 50=now. plus balance .

On Thu, Sep 18, 2014 at 11:40 AM, A. de Rothschild <mailto:[REDACTED]> wrote:

No not jardine- they hate each . I have no restrictions. </=iv>

I re-read their motions : 70 mio capital+ 300mio additionnal debt =

Very heavy on their balance sheet.

No cla=ity,no description of fund use and asking for entire powers to be given to=mgt .

Sent from my iPhone

On 18 sept= 2014, at 17:26, "jeffrey E." <jeevacation@gmail.com <mailto:jeevacation@=mail.com> > wrote:

</=iv>

maybe , with jardine,=C2 but doubtful, -- do you have restrictions on the=C2 shares. you own. sale transfer etc.

On Thu, Sep 18, 2014 at 10:=9 AM, A. de Rothschild <mailto:[REDACTED]> wrote:

It s looks more like thst the y=re preparing their group for a merger

Sent from my iPhone

On 18 sept. 2014, at 14:02, "jeffrey E." <jeevacation@gmail.com</=>> wrote:

= dont think they are going to sell. i think they are buying back, shares=C2 and issuing new ones. i see no real problem for yo=, none

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=A0 please note

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