
From: jeffrey E. <jeevacation@gmail.com>
Sent: Thursday, September 18, 2014 8:10 PM
To: A. de Rothschild
Subject: Re:

speak?

On Thu, Sep 18, 2014 at 1:56 PM, A. de Rothschild <[REDACTED]> wrote:

B4 i need them to give in on the brands .

Yves spoke =o Kathy . He was fuming against Pillsbury and wants to stop using them =A0

Sent from my iPhone

On 18 sept. 2014, at 19:09, >jeffrey E." <jeevacation@gmail.com <mailto:jeevacation@gmail.com>> wrote:

yes, I've gone through all their numbers and have spoken to friends.

I see no problem=for you, and in fact if I were to sell them your stock I would make =t at a price that reflected the movement over the next two years. =A0 (the term of the new directors.) so see the 5.3 million shares at the=highest 5 day average over the next two years. 17 50 now. plus= balance .

On Thu, Sep 18, 2014 at 12:38 PM, A. [REDACTED] >
=gt; wrote:

Sent from=my iPhone

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

so they are raising debt in an attempt to get their stock price=up. its a good move

On Thu, Sep 18, 2014 at 12:00 PM, A. de Rothschild=<[REDACTED]>
wrote:

Yes they can buy back up to 10% of their shares at max =rice 35 on the mkt.
If I sell to them it's at current= mkt price 17.40

Sent from my iPhone

On 18 sept. 2014= at 17:49, "jeffrey E." <jeevacation@gmail.com> wrote:

but they have asked for for p=rmission to buy in common shares. up to 35 e , each; =A0 so do i understnd correctly that you could sell your 5 imllion shares t= anyone?

On Thu, Sep 18, 2014 at 11:40 AM, A. de Rothschild <=a href="mailto:████████" target="_blank"> ██████████ = wrote:

No=not jardine- they hate each . I have no restrictions.
I re=read their motions : 70 mio capital+ 300mio additionnal debt -
=div>Very heavy on their balance sheet.
No clarity,no descr=ption of fund use and asking for entire powers to be given to
mgt . <=div>

Sent from my iPhone

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

maybe , with jardine, but doub=ful, -- do you have restrictions on the shares.
=A0 you own. sale transfer etc.

=br>
On Thu, Sep 18, 2014 at 10:49 AM, A. de Roth=child <████████>
<mailto:████████> wrote:

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

Sent from my iPhone

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

I dont think they a=e going to sell. i think they are buying back, shares and
issuing ne= ones. i see no real problem for you, none

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=C2 please note

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