
From: Jeffrey Epstein <jeevacation@gmail.com>
Sent: Thursday, October 31, 2013 1:32 PM
To: Tazia Smith
Subject: Re: FB down despite solid earnings, ARIA down 50%, EURUSD down ~1.365 [C]

yes to fb calls but lets not get called away. . no=A0

On T=u, Oct 31, 2013 at 9:25 AM, Tazia Smith [REDACTED] wrote:

Classification: Co=fidential

Good Morning Jeffrey -

EURUSD sold off on the FOMC announcement (or rather absence thereof ?). Thoughts on a knock-in? Indicative levels from DB FX: a 6mo 1.3650 Vanilla Euro put costs ~ \$30k per Euro 1mm. vs the 6mo 1.3650 Euro Put with a KI at 1.3900 costs ~\$13k per Euro 1mm. (indicative levels only, subject to market movement)

ARIA - down 50% (~\$2.30 in pre) on reports that the co is discontinuing Iclusig marketing in the US

FB - ~\$46.66 (down 4.5%) posted solid Q3 EPS of \$0.25 vs. \$0.19 cons. Stock was volatile in the aftermarket, dropping ~15% after the CFO suggested ads-per-user growth was tapped out. Shares recovered to ~\$49 in the pre this morning as bulls point to pricing and continued successful mobile growth as the forward earnings drivers. DB's analyst remains positive but suggests FB mgmt removed the "dr=am scenario" that he thought would continue for a couple more years. (DB = Buy, \$61tgt).

Recall, you own 17.5k shares of FB. Dec calls?

Speak with you soon,
Tazia

Source: Bloomberg, Streetaccount, DB Global Markets Research 10/31/13
<https://ger.gm.ci=.intranet.db.com/ger/document/pdf/0900b8c08775b75e.pdf>
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