
From: Richard Kahn <[REDACTED]>
Sent: Tuesday, January 29, 2019 8:06 PM
To: Jeffrey Epstein
Subject: 5G

Fiszel in annual letter also likes 5G story but believes that =oftware maintenance revenue is the play via Nokia (NOK)
Please advise if you want to buy Paul Stock KEYS or NOK, both =r neither..
If buy please advise on position =ize..
Thank you

<https://finance.yahoo.com/quote/KEYS?p=KEYS&.tsrc=fin-s=ch>

[https://finance.yahoo.com/quote/NOK?p=NOK&.tsrc=fin-src="](https://finance.yahoo.com/quote/NOK?p=NOK&.tsrc=fin-src=)

Richard Kahn
HBRK Associates Inc.
575 Lexington Avenue 4th Floor
New York, NY 10022
[REDACTED]
[REDACTED]

Begin forwarded message:

From: =/b>Paul Barrett <[REDACTED]>

Subject: =/b>RE: To Do

Date: =/b>January 29, 2019 at 12:04:10 PM =ST

To: =/b>J <jeevacation@gmail.com>

Cc: Richard Kahn <[REDACTED]>

I am working the sale of =VGO.

Let me =now if you want to do anything on KEYS.

Paul Barrett
Alpha Group Capital LLC
142 W 57th Street, 11th Floor, New York, NY 10019
[REDACTED]
[REDACTED]

From: Jilt;jeevacation@gmail.com <mailto:jeevacation@gmail.com>
Sent: Tuesday, January 29, 2019 1:33 AM
To: Paul Barrett <[REDACTED]>
Subject: Re: To Do

Ok

On Tue, Jan 29, 2019 at 1:25 PM Paul Barrett <[REDACTED]>
<mailto:[REDACTED]> > wrote:

Jeffrey

We should take profits on Broadcom. We are up \$110,000 on our 2MM position. The semi index is up 15% from the lows in December. It feels like the short covering rally is over and recent earnings reports from the likes of Nvidia have been very disappointing which I suspect will put pressure on the whole sector.

I think getting exposure to 5G would be a better use of the proceeds. Testing of 5G equipment will be a huge market over the coming years. Keysight (KEYS) provides testing for all parts of the 5G network - base stations, cell sites, equipment, networks etc. Keysight will benefit across the spectrum for the next 2 years and has #1 market share across the globe and is the sole beneficiary.

Ticker: &n=sp; KEYS
Market Cap: \$13bln
2019 E: &nbs=; 19x

Only 6 analysts cover the stock so it is under the radar which I like. This is a top pick from the research shop I like out of London (who gave us CD Projekt).

Paul

Paul Barrett
Alpha Group Capital LLC
142 57th Street, 11th Floor, New York, NY 10019
[REDACTED]
[REDACTED]

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please note

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JEE

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