
From: jeffrey E. <jeevacation@gmail.com>
Sent: Thursday, June 14, 2018 11:17 AM
To: Paul Barrett; Richard Kahn

paul on monday you shoudl come with a strategy. =A0 ! real ideas. detailed. the c=ncept of investing in sectors . or buying berkshire apple or google=C2 is not an idea. that merits. more than 30 seconds. . .=C2 something clearly is wrong. . I have great respect for you .=C2 we have always done well together. . i= seems however that you might need to have a full orgaiznation behind or a=ongside you. I had assumed you were capable of con=iniuing on your own after JPM. I want to find a sol=tion . i think you should focus on flow. , traders. =A0 ideas. / I recall saying that a move from=JPM would increase both risk and reward. / =C2 as you would have to perform . I m less conc=rned with the fact that the positions you sold , would have been a larger =rofit that you were able to generate. option trading for 2000 dollar=. . silly, as you recall the ATT positon was scaled back=by me, and only allowed at all to give you authority over the results. =A0 you rode positions down instead of taking quick losse= . the trading envciouemnt has been superb,. e gam=ng is a new sector and shows promise. but as always its , which stoc=. not so easy. . you had total control over =rading. but sat and watched !!. amanda has given us one losing tra=e after another , so i stopped all contact. you de=ided to continue. I sold spotify. you decide to buy it k=owing i just sold. ? super silly, as you can tell I am=quite surprised by the results. It matters less how you calcu=lte it, I can see you point of view. but in reality the =results are known as the "but for " =A0 test. ie but for paul being involve=. results. paul involved. result=. easy. . but againk as it is early less importn=t than the lack of tradding. underlying dynamice stragety , and sect= investing. If I wanted a macro long only . 10 funds p=ovide years of returns and experinece. . even long short=funds. (i see no shorts except for options "). how=is that possible. ? I realize you will now be gun =hy, sorry, .

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=div dir="ltr"> please note

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