
From: jeffrey E. <jeevacation@gmail.com>
Sent: Monday, July 24, 2017 6:25 PM
To: Paul Barrett
Subject: Re: To Do

Ok to all

=div>On Mon, Jul 24, 2017 at 1:55 PM Paul Barrett <[REDACTED]> <mailto:[REDACTED]> > wrote:

Rich

◆=A0

I would like to clean up the following=positions:

Sell Akorn – they were bought for cash and makes no sense=to hold from here

Sell GE – the company =ould take years to turnaround and I fear it will become another IBM.

Our GM position is way to big. I don't like an= of the OEMs. Ride sharing and lower millennial car ownership will be a se=ious headwind for all of these car producers. I would gladly rotate the en=ire GM exposure to the Driver Assistance Theme.

=ell Match – position very small

Sell Mob=IEye – INTC bought them and I hate Intel

Sell Te=raform Global – position too small

Sell =lobal Partner Acquisition Corp

<=u>

The next generation of cars and smartphones a=e going to have 3D sensors (think Iris scan vs fingerprint scan). So we sh=uld \$2.5MM from the proceeds of the above sales and buy \$500,000 of each o= the following:

- * ST Micro
- * AMS AG
- * Sunny Optical
- * ASM=

And lastly we need more eGaming exposure. We have Tencent and NetEase— both of which we will add on the next opportunity. So I would like to add \$500,000 each to:

- * *<=i class="m_-1569134557135464472MsoListParagraph" style="margin-left:0i">Ubisoft Modern Times*

=C2 

Paul

<= class="MsoNormal">Paul Barrett


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