
From: jeffrey E. <jeevacation@gmail.com>
Sent: Tuesday, August 1, 2017 5:23 PM
To: Paul Barrett
Subject: Re: 2 things to do

ok

On Tue, Aug 1, 2017 at 1:19 PM, Paul Barrett <[REDACTED] <mailto:[REDACTED]>> wrote:

Jeffrey

I think we see inflation tick higher in the coming two months after 4 low monthly prints. If that happens we probably see the 10yr move higher by 20-30 bps and banks take another leg up.

Buy another \$2mm of XLF (Fins etf). We have \$1mm which is up ~3%.

MXN remains on my radar. If we get to 18.25 I would like to build a position in 5yr Mexican Govt bonds. They yield around 6%. So decent carry and a clean way to get long MXN.

Buy \$1mm if USDMXN gets to 18.2500.

Paul

Paul Barrett
<tel:[REDACTED]> =/span>

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=C2 please note

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JEE

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