
From: Gianni Serazzi <[REDACTED]>
Sent: Thursday, May 4, 2017 2:04 AM
To: jeffrey E.
Subject: Tesla

Down from 326 to 303 since we spoke... And they have not announced that they will probably build the first model 3 basically by hand so hit the official launch date but ramp-up will be at least 3 months late beyond schedule and the competitors will have very similar battery costs without having spent billions on Gigafactory... This info comes from estimate of my friend in Ferrari that works on the of electric motors strategy (like the one they built on LaFerrari), thus tradable

ThxG