
From: Peter Thiel <████████>
Sent: Friday, May 1, 2015 12:35 AM
To: jeffrey E.
Subject: Re:

Negative-yielding notes, etc seem like a sign of something really crazy...

No conviction on oil but agree that risks remain to the upside on price -- =audi appointment of bin Nayef seems like a big deal, suggesting they are r=ally scared.

On Apr 30, 2015, at 2:18 PM, jeffrey E. <jeevacation@gmail.com<mailto:jeevacation@gmail.com>> wrote:

option pricing totally out of whack, , eurobonds soon the all time grea= short. unlikely to break zero. so asymmetric risk reward . keep=an eye on saudi and attitude towards keeping oil low . young generat=on not happy with that idea

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please note

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