
From: Paul Morris [REDACTED]
Sent: 2/3/2014 4:45:06 PM
To: Nav Gupta [REDACTED]
CC: Tazia Smith [REDACTED]; Vinit Sahni [REDACTED]
Subject: Re: percentages get a read from your team [C]

Classification: Confidential

Watford Re looks like a new hedge fund with bermuda reinsurance wrapper started by Highbridge/Arch capital, don't know what type guess credit or long/short

i have not talked with him about energy renaissance but likely liquid equities across producers or secondary beneficiaries (e.g. auto, chemicals), JP has created a basket recently focused on this theme

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To: Tazia Smith/db/dbcom@dbamericas,
Cc: Vinit Sahni/db/dbcom@dbemea, Paul Morris/db/dbcom@dbamericas
Date: 02/03/2014 04:37 PM
Subject: Re: percentages get a read from your team [C]

What risk is in energy renaissance theme and Watford re.

Thx

On 3 Feb 2014, at 20:58, "Tazia Smith" <[REDACTED]> wrote:

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Sounds good. I'll send through our initial suggestions, Nav, and then you can opine on top of that, that'd be great.

<0.220.gif>

Tazia Smith
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