Sent from my BlackBerry® wireless device

-----Original Message-----
From: "Alexander Rocos" <rocos@isthmusholdings.com>

Date: Wed, 15 Jul 2009 01:21:30
To: <mahmoud.thiam@gmail.com>
Subject: Re: China Investment Corp. 'CIC'

Good morning. Just checking if the message with details on the possible deal was sent to me as nothing received so far my end. Thanks.

Sent via BlackBerry®

-----Original Message-----
From: mahmoud.thiam@gmail.com

Date: Tue, 14 Jul 2009 12:18:58
To: <rocos@isthmusholdings.com>
Subject: Re: China Investment Corp. 'CIC'

The people themselves
Sent from my BlackBerry® wireless device

-----Original Message-----
From: "Alexander Rocos" <rocos@isthmusholdings.com>

Date: Tue, 14 Jul 2009 12:17:40
To: <mahmoud.thiam@gmail.com>
Subject: Re: China Investment Corp. 'CIC'

Sorry Mahmoud: just so I am clear, are these your people preparing the briefing or third party?

Sent via BlackBerry®

-----Original Message-----
From: mahmoud.thiam@gmail.com

Date: Tue, 14 Jul 2009 11:50:22
To: <rocos@isthmusholdings.com>
Subject: Re: China Investment Corp. 'CIC'

They ask whom they should address info to. They will send introductory package within an hour and can proceed with full face to face presentation shortly after. They just went through a full due diligence on the asset and are fully prepared

Sent from my BlackBerry® wireless device

-----Original Message-----
From: "Alexander Rocos" <rocos@isthmusholdings.com>
Date: Tue, 14 Jul 2009 10:57:20
To: <mahmoud.thiam@gmail.com>
Cc: Alexander Rocos (Personal)<rocos@shl63.net>
Subject: Re: China Investment Corp. 'CIC'

/// Please respond to rocos@shl63.net ///

There is definitely interest from CIC in such a proposal and they have asked me in the 1st instance to obtain/ brief them with as many details as possible of the opportunity.

Zhang and the mineral resource specialists need to be able to draw up as rapidly as possible a fuller outline of the deal to present to their own initial internal investment committee to assess. This can be done quite fast but also as Zhang mentioned confidentiality is of paramount importance due geopolitical issues.

Can we put more detail together at this stage to drive it forward quickly? Zhang leaves Beijing tomorrow for 3 days - how long are you here?

The second and final stage, once the CIC investment committee gives the formal green light, is to take it to the CIC board to get it cleared. If time sensitive they can do this fast. But we will need to supply as much info as possible and draw up a full picture for them.

We are here to help at all stages. What do you suggest - can we formalise the info?

Please let me know.

/// Please respond to rocos@shl63.net ///

With Kind Regards,

Alexander Rocos

Sent via BlackBerry®

-----Original Message-----
From: mahmoud.thiam@gmail.com
Date: Tue, 14 Jul 2009 09:55:21
To: <rocos@shl63.net>
Subject: Fw: China Investment Corp. 'CIC'

Sent from my BlackBerry® wireless device

-----Original Message-----
From: mahmoud.thiam@gmail.com
Date: Tue, 14 Jul 2009 09:05:30
To: <rocos@isthmusholdings.com>
Subject: Re: China Investment Corp. 'CIC'

Great. If you could gage interest on the general info I gave you...? If attractive I can set a meeting thru you immediately

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-----Original Message-----
From: "Alexander Rocos" <rocos@isthmusholdings.com>
Date: Tue, 14 Jul 2009 09:02:36
To: <mahmoud.thiam@gmail.com>
Subject: Re: China Investment Corp. 'CIC'

Noted. I will tell Mr. Zhang and speak with him on it - if you need to speak again on it we can do so anytime. My Chinese mobile
phone is on or email is fine.

Sent via BlackBerry®

-----Original Message-----
From: mahmoud.thiam@gmail.com
Date: Tue, 14 Jul 2009 08:58:37
To: <rocos@isthmusholdings.com>
Subject: Re: China Investment Corp. 'CIC'

Had to be vague on purpose but have the perfect deal for cic. An iron ore project with in excess of d billion toins of high grade ore. The developer in talks with libyan sovereign fund for a $3.5 billion stake. I can impose cic as co investor or replacement to lybia. Can put developer in touch very fast. Chinalco and mce have approched them but I have not given my go ahead yet. I have a very good relationship with them and can make this go fast and smooth
Sent from my BlackBerry® wireless device

-----Original Message-----
From: "Alexander Rocos" <rocos@isthmusholdings.com>
Date: Tue, 14 Jul 2009 08:17:38
To: <mahmoud.thiam@gmail.com>
Subject: Re: China Investment Corp. 'CIC'

Here now. Wait for you by main reception desk.
Sent via BlackBerry®

-----Original Message-----
From: mahmoud.thiam@gmail.com
Date: Tue, 14 Jul 2009 08:07:52
To: <rocos@isthmusholdings.com>
Subject: Re: China Investment Corp. 'CIC'

U here?
Sent from my BlackBerry® wireless device

-----Original Message-----
From: "Alexander Rocos" <rocos@isthmusholdings.com>
Date: Tue, 14 Jul 2009 07:51:16
To: <mahmoud.thiam@gmail.com>
Subject: Re: China Investment Corp. 'CIC'

I will be exactly on time. Mr. Zhang will arrive separately. I will send you a message when we are both downstairs.
Sent via BlackBerry®

-----Original Message-----
From: mahmoud.thiam@gmail.com
Date: Tue, 14 Jul 2009 07:48:49
To: <rocos@isthmusholdings.com>
Subject: Re: China Investment Corp. 'CIC'

2023 you may need an access card. Will u be on time or a few min late? I can plan to pick you up downstairs
Sent from my BlackBerry® wireless device

-----Original Message-----
From: "Alexander Rocos" <rocos@isthmusholdings.com>
Shall we come directly to your suite? If so please advise room number.

Sent via BlackBerry®

-----Original Message-----
From: mahmoud.thiam@gmail.com
Date: Tue, 14 Jul 2009 02:08:45
To: <rocos@isthmusholdings.com>
Subject: Re: China Investment Corp. 'CIC'

Please confirm. And thank you for the help
-----Original Message-----
From: Alexander Rocos (Personal Mail)
To: Mahmoud Thiam
ReplyTo: rocos@isthmusholdings.com
Subject: RE: China Investment Corp. 'CIC'
Sent: Jul 14, 2009 09:59

Dear Mahmoud,

Mr. Zhang Qing of CIC (very close personal friend of mine) can meet you today at about 4 pm for a strictly private meeting if that suits you. Zhang is a real friend and head of new deals at CIC with a personal specialisation in commodities and energy for the Alternative Asset division. He is the right guy to see.

Does that timing suit you?

Please do let me know as I will cancel my flight to Shanghai if we go ahead.

Many thanks.

Alexander Rocos

-----Original Message-----
From: mahmoud.thiam@gmail.com
Sent: 14 July 2009 09:49
To: rocos@sh163.net
Subject: Re: China Investment Corp. 'CIC'

Hi Alex. It was great seeing you guys indeed. Although I don't want to violate protocol by meeting potential competitors to my host, I feel it would be a pity to come all the way here and not meet with them. Do you think a discrete meeting could take place in my suite sometime today?

Best
Mahmoud

PS. Alternatively I can inform and invite Sam to attend... Any thing you could dig out about my host's capabilities would be very helpful as well. Thanks
Dear Mahmoud,

It was really very good to see you again last evening and I know both Wang Qi and I were glad to see you looking so well.

I have had a short discussion this morning with senior management of CIC with responsibility for the Alternative Assets Division who, as it happens, are themselves pretty familiar with Africa (some of them are formerly top executives of State-owned 'Zhenhua Oil' which is in turn a subsidiary of China's largest State-owned military industrial group) and we have worked on some deals there (mostly Nigeria) some years ago.

They have expressed a very real desire to meet with you in Beijing if possible during this trip to initially explain more about themselves and also to familiarise themselves with you and your likely interests. Do I understand this will not be possible?

I would very much appreciate to hear so that we could perhaps arrange something now, or failing that arrange something on your next trip.

Please let me know.

With best wishes,

Alexander Rocos

Sent from my BlackBerry® wireless device

Sent from my BlackBerry® wireless device