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UNITED STATES SECURITIES AND EXCHANGE COMMISSION

Washington, D.C. 20549

FORM 13F

FORM 13F INFORMATION TABLE

OMB APPROVAL

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COLUMN 1 NAME OF ISSUER	COLUMN 2 TITLE OF CLASS	COLUMN 3 CUSIP	COLUMN 4 VALUE (x\$1000)	COLUMN 5			COLUMN 6 INVESTMENT DISCRETION	COLUMN 7 OTHER MANAGER	COLUMN 8		
				SHRS OR PRN AMT	SH/ PUT/ CALL	DFND			SOLE	SHARED	NONE
ALIBABA GROUP HLDG LTD	SPONSORED ADS	01609W102	8,473	50,000	SH		DFND		50,000	0	0
ALPHABET INC	CAP STK CL C	02079K107	9,728	9,000	SH		DFND		9,000	0	0
CARDINAL HEALTH INC	COM	14149Y108	9,420	200,000	SH		DFND		200,000	0	0
CLEVELAND CLIFFS INC	COM	185899101	11,737	1,100,000	SH		DFND		1,100,000	0	0
DISNEY WALT CO	COM DISNEY	254687106	8,378	60,000	SH		DFND		60,000	0	0
FEDEX CORP	COM	31428X106	9,851	60,000	SH		DFND		60,000	0	0
GREENSKY INC	CL A	39572G100	7,374	600,000	SH		DFND		600,000	0	0
SPORTSMANS WHSE HLDGS INC	COM	84920Y106	6,037	1,597,011	SH		DFND		1,597,011	0	0
TAILORED BRANDS INC	COM	87403A107	10,675	1,850,000	SH		DFND		1,850,000	0	0
WESTERN DIGITAL CORP	COM	958102105	11,888	250,000	SH		DFND		250,000	0	0