

Twitter Thread by Intrinsic Compounding



Intrinsic Compounding

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What all do I read to keep myself informed about new opportunities and to keep updating myself with the new happenings in the world?

Time for a thread about all tools I use to research, Find information and update myself about different subjects



Blog Subscriptions I am subscribed to for investing:

1. [@borrowed_ideas](#)
2. Non-GAAP Substack
3. The Flywheel substack
4. Read The Generalist
5. Kiran D- has a blog on word press
6. Uncommon Profits
7. Used to read stalwart but they reduced the posting
8. [@rohitchauhan](#)

9. [@IntelsenseI](#)
10. [@SeekingAlpha](#)
11. [@themotleyfool](#)
12. Betaoalpha Substack by [@mehrotra_saket](#)
13. [@MarcellusInvest](#)
14. [@PerfectResearch](#)

Others that I like to read

1. [@TheKenWeb](#)
2. [@EconomicTimes](#) Prime. Recently they have improved
3. [@TheEconomist](#)
4. [@forbes_india](#)

Sectoral experts/Analysts that I follow:

For Pharma- [@AdityaKhemka5](#) , [@unseenvalue](#) & [@punitbansal14](#) + Contract Pharma for cdm

For Banking- [@HemindraHazari](#) , Digant Haria and Ashish Gupta from Credit Suisse (he's terrific)

For chemicals- Rohit Nagraj from Emkay Global

and chemical weekly+Chemical reports monthly from B&K securities

Broker reports that I like to read whenever I can:

1. Spark capital-hands down the best reports in the country.
2. Ambit- publish some good stuff. But rarely available
3. JM Financial- exceptional reports.

Youtube Channels that I follow: Have to be careful here, mostly it is noise or shallow backed knowledge

1. PPFAS- synonymous for integrity
2. Recently started watching from [@suru27](#)
3. CFA Society channel India and Flame University's channel
4. Podcasts by [@safalniveshak](#)
5. PMS Aif world
6. Must watch- Neeraj Shah on BQ Quint
7. Aif &PMS experts

Some of the fund managers I respect the most:

1. [@SamitVartak](#) I try to read and watch everything posted by them.
2. [@virajmehta16](#) - all the letters, interviews and presentations
3. ASK by Bharat shah
4. [@rohitchauhan](#) from RC Capital
5. [@a_basumallick](#) sheer brilliance due to multiple styles
6. [@jitenkparmar](#)

Blogs for worldly wisdom and gyaan

1. [@farnamstreet](#)
2. [@morganhouse1](#)

3. [@Sanjay__Bakshi](#)
4. [@TheAncientSage](#)
5. [@jordanbpeterson](#)
6. YT Channel of Capt. Sinbad

7. Every useful thread on Valuepickr. Might have read more than 48k posts.

8. Follow [@nrmangal](#) and Kimi Krishanraj (diffsoft on VP) for forensics.

That is it folks- these have been reading/watching habits for sometime now.

Retweet if you found this useful :)