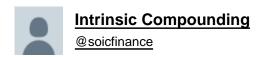
Twitter Thread by Intrinsic Compounding





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. @Intelsensel
- 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 cdmo

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>@a_basumallick sheer brilliance due to multiple styles
- 6. @jitenkparmar

Blogs for worldly wisdom and gyaan

- 1. @farnamstreet
- 2. @morganhousel

- 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:)