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

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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 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_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 :)