Twitter Thread by Ram Bhupatiraju



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My Monthly Learning Calendar for Investing.■■

If I had 1 hour per day (for non-Company related research), this is what I would do.

Going thru specific topics on specific days should help streamline the reading/learning process w/o causing too much information overload.



My Monthly Learning Calendar

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Quarterly & Intermittent checks
Investing Fundamentals	Tech	Broader Perspectives	Deep dives & Blogs	Investing Services content	Podcasts & Explorations	Substacks & other	Fund Letters & more Substacks
1 Ensemble Capital John Huber	2 Stratechery Baillie Gifford	3 Morgan Housel Nick Magguilli	4 Mostly Borrowed Ideas The Undercover Fund Manager Gaucho Rico	5 Motley Fool Stock Advisor & Rule Breakers Services	6 Invest Like the Best Business Breakdowns Crypto Exploration	7 Richard Chu Jamin Ball Stock Novice The Generalist	Howard Marks Memos Michael Mauboussin Aswath Damodaran
8 Marcelo Lima Safal Niveshak	9 Software Stack Investing CB Insights	10 Ian Cassel Ben Carlson Minerva Review	11 Chris Seifel Quality Compounders Thomas Chua	12 7 Investing content Potential Multibaggers content	13 Motley Fool Money Motley Fool Industry Focus 20VC DeFi Exploration	14 Investment Talk Tanay Jaipuria Weekly 10K Jonah Lupton	Saga Partners Lindsell Train Shaw Spring Hayden Capital Polen Capital
15 Twitter Threads from Honam 10-K Diver Sahil Bloom	16 Hhhypergrowth Matthew Ball	17 Masters Invest Novel Investor Investor Amnesia	18 The 10th Man Digital Porcupine Buck on Software	19 Brian Feroldi & Brian Stoffel content Saul's Discussion Board	20 Acquired FM Chit Chat Money Blockchain Exploration	21 Brad Freeman MT Capital The Global Investor	Rihard Jarc Soumya Zen Innovestor Adventures in Finance Joshua Tai Irish Born Investor Mazwood Cap
22 Focused Compounding Charlie Bilello	23 Beth.Technology Public Comps	24 Gavin Baker Telescope Investing	25 Ahmad Jivraj The Wealthy Owl Left Brain IR	26 Investing City content Seeking Alpha : Bert Hochfeld & App Economy Insights	27 Motley Fool Rule Breaker The Acquirers Podcast We Study Billionaires NFT Exploration	28 Seeking Alpha : Andres Cardenal Integrator Kayode Omotosho	
29 Gary Mishuris Drew Dickson	30 Ben Evans Adam Hartung						@RamBhupatiraju

Investing in individual stocks is more than just company specific research.

It's about having a broader perspective on many topics including Investing principles/philosophy/history, Industry trends/landscapes, and thoughts/deep dives from other reliable sources.

I'm grateful to all these awesome folks that put out such quality content.

Also separate h/t to all the folks I follow on Twitter (list always growing, albeit slowly). You posts diversify and enrich my feed & learning.

Disclaimers :

Below thread has the resources listed by topic (and not by calendar days).

The below is NOT a ranking of resources. Just a listing of my current fav resources based on specific topics.

Descriptions on why I like each resource is not listed here (due to the huge #). You can find that info for most of these resources in my current pinned tweet.

The goal is not to drown myself in so much content, but selectively scanning and then diving into the specific posts that most relate to my investing process and current interests.

Let's dive in. ■■■■

■Mondays : Investing Fundamentals

Day 1

Ensemble Capital @IntrinsicInv @ToddWenning
https://t.co/lQOBSNv1Nh

John Huber @JohnHuber72
https://t.co/QslJlfCejm

Day 8

Marcelo Lima @MarceloPLima
https://t.co/mvGcx7KT6h

Safal Niveshak @safalniveshak
https://t.co/JrY6B8AUsa

Day 15

These folks pack so much wisdom and learning in their Twitter Threads. Confession : I've only finished reading 25% of my bookmarked tweets from them. Time to make some time to finish the rest.

@honam
@10kdiver
@SahilBloom

Day 22

Focused Compounding @FocusedCompound
https://t.co/BbFnuVkL1h

Charlie Bilello @charliebilello
https://t.co/qkPNUPBGOx

Day 29

Gary Mishuris
https://t.co/9CqfJDNJix

Drew Dickson @AlbertBridgeCap
https://t.co/Jzz1F2nyaI

■ Tuesdays : Tech

Day 2

Stratechery @stratechery
https://t.co/VsNwRStY9C

Baillie Gifford @BaillieGifford
https://t.co/mWycSnTeoB

Day 9

Software Stack Investing @StackInvesting
https://t.co/WQ1yBYzT2m

CB Insights @CBinsights
https://t.co/gNbY55A7gn

Day 16

Hhhypergrowth @hhhypergrowth
https://t.co/kcLKITRLz1

Matthew Ball @ballmatthew
https://t.co/b1Oa1Fz3QC