Twitter Thread by GoldForest Investments

GoldForest Investments
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Some interesting themes:

1. Amines - alkyl amine, balaji
2. Acetyl derivatives- Laxmi organics , Jubilant ingrevia
3.phenols - deepak nitrite
4. Solar/renewable- Borosil renewable, visaka
5. EV theme- Tata power, kabra extrusion, fiem, tata elxi, LTTS (many more)

Keep adding..

QSR and delivery- Jub food, BK, Zomato, devyani

Retail- Dmart, reliance retail

Cons.durable manufact.- Dixon, amber

Music - TIPS, SAREGAMA
Platforms- CDSL, CAMS
Travel monopoply- IRCTC
Digital tech basket- easytrip, cartrade and many upcoming IPOs

Credit cards - SBI Cards
India economics-Bajaj twins
Alcohol- Globus spirit
Rice - Daawat
Broking- angel broking, isec
Insurance- hdfc, icici, sbi

Chemical compunders- many here, my favorites- atul, SRF, aarti ind

Animal API - NGL finechem, sequent scientific

Pharma glass equipment- HLE, GMM

Injectables + pharma - gland, caplin, laurus