

Twitter Thread by GoldForest Investments



GoldForest Investments

@Goldforestinves



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 monopoly- 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 compounders- many here, my favorites- atul, SRF, aarti ind

Animal API - NGL finechem, sequent scientific

Pharma glass equipment- HLE, GMM

Injectables + pharma - gland, caplin, laurus