Twitter Thread by Navneet Saluja D'Souza



Navneet Saluja D'Souza
@EnSaluja



Jubilant Foodwork -10% in pre-open

Organization bigger than the individual will be tested again?

Reaction when Ajay Kaul resigned: -8.2% intraday, closed -5.4%

Since Pratik Pota took over: +417%

#jubilantfoodworks #StockMarket #Nifty

Has more than 70% market share in organized pizza market

Stock -28% YTD
Trades at 59x now vs 78x at its peak



Challenges ahead for Jubilant Foodworks

-Find a successor
-Consumer inflation impacts discretionary spends
-Difficult to take another price hike
-Freight & delivery bill to be impacted by fuel price hikes

#dominospizza