Twitter Thread by Conviction | Patience



Conviction | Patience
@unseenvalue



Real estate - unseen exposure

Playing real estate and home improvement structural story in \U0001f1ee\U0001f1f3 via a focused proxy consumption \U0001f9fa

1. Asian Paints
2. Pidilite
3. SHIL (Hindware portfolio)
4. Fragrance SpecChem (Kelkar & Fairchem)

Consumption | Proxy Consumption

— Conviction | Patience (@unseenvalue) January 10, 2020