# Twitter Thread by Intrinsic Compounding



**Intrinsic Compounding**
@soicfinance



**@sahil_vi @itsTarH 1. Healthcare**
**2. Cdmo/crams in Pharma and agro**
**3. Spechem**
**4. Music streaming**
**5. Building material**
**6. Exchanges**
**7. Ecommerce Businessess**
**8. Financialization**
**9. Niche Manufacturing due to cost arbitrage**
**10.Certain Auto anc cos with tie ups**
**11. Insurance space**
**12. Animal health**

@moatandvalue @sahil_vi @itsTarH 13. Cybersecurity cos abroad. Not in India.
14. Digital transformation: digital is an overused word though.
15. Biotechnology: emerging theme. Waiting for it to play out.
16. Green energy: some players already benefitting