

## Twitter Thread by Saket Reddy



**Saket Reddy**

[@saketreddy](#)



**Everything housing is moving now, previously it was mainly the ancillary plays like Pipes, Ceramics, Adhesives and Cement. Now we have the home builders, CGD's, HFC's, MDF, Laminates, Sinks, etc..**

**The Home Building Theme has just broadened itself and is moving in top gear!**

The best ways to play the real estate revival theme instead of buying the home builders :-

1. Ceramics (CERA, KAJARIA)
2. Pipes (ASTRAL, SUPREME, APLAPOLLO)
3. Paints (ASIAN, BERGER)
4. Cement (JKCEM, SHREEC)
5. Construction Chemicals (PIDILITE)
6. Electricals (POLYCAB, HAVELLS)

— Saket Reddy ([@saketreddy](#)) [November 21, 2020](#)