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