

Twitter Thread by Brad Kaellner - Stock Compounder

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Incumbents almost always prevail with sustaining innovation

In disruptive circumstances, the entrants are likely to beat the incumbents

H/t Clayton Christensen, The Innovator's Solution

The chart also shows that disruption is always at work—meaning that disruptors in one generation become

FIGURE 2-4

Examples of Companies and Products Whose Roots Were in Disruption

