

## Twitter Thread by Brad Kaellner - Stock Compounder



**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

