

## Twitter Thread by [Brian Feroldi](#)

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Here are some of the big investors that track:

**Altarock Partners**

**AKO Capital**

**Appaloosa**

**Akre Capital**

**Broad Run**

**Dorsey Asset**

**Duquense**

**Ensemble**

**Fundsmith**

**Polen Capital**

**Third Point**

Here are their current top 10 holdings (in order) and links to their latest buys/sells



Altarock Partners

Top 7

\$TDG

\$CHTR

\$GOOGL

\$FB

\$MCO

\$MA

\$V

<https://t.co/N4SntCHh2b>

AKO Capital

Top 10 (in order):

\$LIN  
\$BKNG  
\$EBAY  
\$V  
\$EL  
\$GOOG  
\$NKE  
\$RACE  
\$OTIS  
\$PG

<https://t.co/IWICD1HZU9>

Appaloosa: (David Tepper)

Top 10:

\$TMUS  
\$AMZN  
\$MU  
\$FB  
\$PCG  
\$GOOG  
\$BABA  
\$TWTR  
\$HCA  
\$ET  
\$MA

<https://t.co/qWrwOKtI3f>

Broad Run

Top 10

\$ORLY  
\$BAM  
\$AMT  
\$KMX  
\$MKL  
\$AON  
\$ECPG  
\$AMWD  
\$SSNC  
\$NVR

<https://t.co/h9kuU7RSgk>

Dorsey Asset Management (Pat Dorsey)

Top 9

\$FB

\$WIX

\$SMAR

\$GOOG

\$EBAY

\$UPWK

\$PYPL

\$DESP

\$ROKU

<https://t.co/LZf9PrWJpH>

Duquesne Family Office (Stanley Druckenmiller)

Top 10

\$MSFT

\$TMUS

\$AMZN

\$SBUX

\$FCX

\$PANW

\$SE

\$PENN

\$NUAN

\$DIS

<https://t.co/VVD3dUdgsX>

Ensemble Capital

Top 10

\$NFLX

\$FRC

\$HD

\$MA

\$RACE

\$GOOGL

\$ISRG

\$MASI

\$BR  
\$BNKG

<https://t.co/4B6w9VArQB>

[@FundsmithLLP](#) (Terry Smith)

Top 10

\$PYPL  
\$MSFT  
\$IDXX  
\$EL  
\$INTU  
\$SYK  
\$PM  
\$MKC  
\$PEP

<https://t.co/wLR9sLjjym>

Polen Capital Management

Top 10

\$MSFT  
\$FB  
\$GOOG  
\$ADBE  
\$ABT  
\$V  
\$MA  
\$ACN  
\$ADSK  
\$ZTS

<https://t.co/X3tH751PBA>

Third Point

Top 10

\$PCG  
\$DIS  
\$DHR  
\$IAA  
\$UPST  
\$CHTR

\$AMZN  
\$GOOG  
\$BURL  
\$INTU

<https://t.co/1khoCASWzJ>