

Twitter Thread by [Brian Feroldi](#)



[Brian Feroldi](#)

[@BrianFeroldi](#)



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>