

Twitter Thread by Benchmark



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■ GLOBAL GEMS (+100 Stocks) ■

■■ SWEDEN

\$MIPS

\$EVO

\$PLEJD

\$EMBRAC

\$KAMBI

\$FNOX

\$SPOT

\$247

\$SINCH

\$CLINKB

\$GETIB

\$PDX

\$MTGB

\$LIME

■■ NORWAY

\$HBC

\$MEDI

\$PSKY

\$KAHOOT

\$CARA

\$AZT

\$ZAPME

\$SSO

■■ FINLAND

\$KNEBV

\$REMEDY

\$REG1V

CONTINUED ■

■■ DENMARK

\$COLOB

\$NZYMB

\$CHEMM

\$NETC.CO

\$FOM

\$VWS

\$SIM

■■ POLAND

\$ALE

\$CDR

■■ GERMANY

\$DHER

\$ZAL

\$M0Y

\$YSN

\$ST5

\$ELG

\$TMV

■■ ITALY

\$NEXI

\$RACE

■■ SPAIN

\$CLNX

■■ AUSTRIA

\$FAA

■■ UNITED KINGDOM

\$DEO

\$TM17

\$GMR

\$OCDO

CONTINUED ■

■■ BELGIUM

\$MTLS

■■ FRANCE

\$UBI

\$RMS

\$MC

■■ NETHERLANDS

\$PRX.AS

\$ASML

\$ADYEN

■■ AUSTRALIA

\$APT

\$EOS

\$XRO

■■ CANADA

\$WELL.TO

\$DCBO

\$LSPD

\$REAL.TO

\$CNI

\$NVEI

\$AT.TO

■■ RUSSIA

\$YNDX

\$OZON

CONTINUED ■

■■ SOUTH KOREA

\$GRVY

■■ JAPAN

\$NTDOY

\$FRCOY

\$LSRCF

\$4477.T

\$NJDCY

■■ CHINA

\$PDD

\$JD

\$XPEV

\$BYD
\$BABA
\$FUTU

■ SOUTH EAST ASIA

\$SHNUF
\$SE

■ LATAM

\$MELI
\$PAGS
\$STNE
\$DESP

■ AFRICA

\$JMIA

■ ROW

\$KASPI.KZ

CONTINUED ■

■■ HONG KONG

\$1810 Xiaomi
\$1585 Yadea
\$0853 Microport
\$6160 Beigene
\$6969 Smoore
\$6098 Country Garden Svc
\$6862 HaiDiLao
\$2013 Weimob
\$9923 YeahKa
\$0268 Kingdee
\$0241 Ali Health
\$2331 Li Ning
\$1347 Hua Hong Semi
\$2382 Sunny Optical
\$1337 Razer

Massive thank you to everyone that suggested stocks!

We can still GROW this list ■

Feel free to suggest NEW stocks ■

<https://t.co/wL4UgMb8b6>

Valuations are stretched in the US \U0001f1fa\U0001f1f8 and the USD is on a rout \U0001f4c9

What are YOUR TOP PICKS in:

\U0001f1f8\U0001f1ea\U0001f1e9\U0001f1f0\U0001f1f3\U0001f1f4\U0001f1eb\U0001f1ee\U0001f1ee\U0001f1f8

Scandinavia

\U0001f1ef\U0001f1f5 Japan

\U0001f1e8\U0001f1f3 China

\U0001f30f South-East Asia

\U0001f30e LATAM

\U0001f30d Africa

\U0001f1e8\U0001f1e6 Canada

\U0001f1ea\U0001f1fa Europe

\U0001f1f7\U0001f1fa Russia

\U0001f449 And, what are "MUST-FOLLOW" international accounts \U0001f464

— Benchmark (@GetBenchmarkCo) December 15, 2020

■ TOP International Accounts ■

@Prof_Kalkyl

@YasLovesTech

@momiage0088

@trevmuchedzi

@tjylha

@Andan_swe

@mhvestergaard

@MichaelWSchultz

@GBredvid

@dividendblower

@INTERBUFFETEN

@MadsC007

@takorinn371

@stock_trap

@pbcinc

CONTINUED ■

@LiviamCapital

@SlingshotCap

@Caaarli552

@Matematikern3

@silwerskold

@gfinance_m

@Shrimpscore

@Kosukeitou

@alexeliasson

Who is MISSING?

■ GAME PLAN ■

Here are the stocks we cover in PRIORITY ■

\$OZON (Covered)

\$YNDX (Covered)

\$EVO (Covered)

\$ALE (Covered)

\$EMBRAC

\$REMEDY

\$SINCH

\$KAMBI

\$MIPS

\$EOS

\$DHER

\$PRX.AS

\$SSO.OL

\$NETC.CO

What should we review FIRST?

Here is the \$ALE Allegro (Warsaw) Take:

<https://t.co/tjDAKPKAIO>

\U0001f6a8 eCommerce EVERYTHING \U0001f6a8

\U0001f310 You liked [\\$MELI](#) [\\$SE](#) [\\$SHOP](#) [\\$AMZN](#) [\\$BABA](#) ?

\U0001f6cd Here is the LEADING Polish eCommerce platform

\U0001f4c8 GROWING at 50% YoY and PROFITABLE

Here is an EASY thread \U0001f447 <pic.twitter.com/KTB95mF0ns>

— Benchmark (@GetBenchmarkCo) [December 15, 2020](#)

\$EVO Evolution Gaming:

<https://t.co/FIleZtftGV>

\U0001f3b0 [\\$EVO](#) 48% YoY GROWTH \U0001f3b0

\U0001f4b8 Leading developer of live casino studios for gaming operators

\U0001f4c8 Sales grew 48% YoY to \u20ac 140m in Q3 \u201920 with EBITDA Margins of 65%

\U0001f525 Live casino\u2019s market grew by 45% EACH year

An EASY thread \U0001f447 pic.twitter.com/xtsykWOUFO

— Benchmark (@GetBenchmarkCo) [December 14, 2020](#)

\$YNDX Yandex

<https://t.co/tVkb4QV5YO>

\U0001f6a8 \$YDNX Russia\u2019s \u201cDo-It-All\u201d \U0001f6a8

Runs ride hailing operations \U0001f695 AND Competes with \$GOOG on search \U0001f50e\u2070\u2070

But also \U0001f449 MUSIC streaming \U0001f3b6 Cloud business \u2601\u207e Food delivery \U0001f6f5

\U0001f4b8 YoY GROWTH in local currency stood at around 30% over last 8 Qs.

Here is QUICK look at \$YNDX \U0001f447 pic.twitter.com/4dlzWqlqOd

— Benchmark (@GetBenchmarkCo) [December 3, 2020](#)

\$OZON Ozon Holdings

<https://t.co/6o85kTmNDQ>