Twitter Thread by Benchmark



Benchmark
@GetBenchmarkCo

■ 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/tjDAKPKAlO

> \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/FlleZtftGV

> \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\ufe0f 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