

Twitter Thread by Ram Bhupatiraju

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On Seeking Alpha, "Integrator" (not sure about Twitter presence) is one of my favorite authors along with

@FromValue

@andrescardenal

@EconomyApp

Bert Hochfeld



Few of my fav articles of his.

1■ The 5 Elements That Make For An Outstanding

2■ On Lessons from Buffett.

- Seek Economic Moats in any investment
- Having an awareness of your circle of competence
- Investing for the ultra long term
- Take advantage of a bargain hiding in plain sight
- Preservation of Capital, Above all

<https://t.co/RZbtIfAyjo>

3■ 5 Common Mistakes In Evaluating High-Growth Companies

- It has already gone up so much.
- Fearing short interest
- Fearing future Competition
- Fearing stock dilution due to secondary offerings
- Fearing current losses

<https://t.co/oaHPtkD2EP>

4■ Ways Investors Cheat Themselves Out Of Long-Term Wealth Creators

- This business doesn't make any money!
- Thinking that you're too late
- Stock volatility
- High Valuation
- About Voting rights
- Aversion to 'averaging up'

<https://t.co/G9egAvc9fX>

5■ The 5 Important Rules For Surviving A Major Economic Downturn

- Strong cash reserves
- Low debt levels
- Good cash flow generation
- An absence of secular headwinds
- Transparent and easily understood businesses

<https://t.co/uxLZC0A8Dh>

6■ 5 Important Lessons From The 'Tech Selloff' (Sep 2020)

- Valuation has, and always will matter
- Declines need to be put in to longer-term context
- Focus on fundamentals, not stock price movements
- Resist the temptation to exit winners
- Focus on quality

<https://t.co/tVsJPf58fg>

7■ What I've Learned From 5 Years Of Running A Growth Portfolio

Owning Sustainably Growing Businesses Pays
Value enhances growth
1st In Any Position Is The Hardest
Dominant Emerging businesses Can Be Very Powerful

<https://t.co/Y5Q20GbgA5>

8■ Observations From A 20-Year Journey

- Making mistakes early
- Understanding where high yield traps lurk
- Developing conviction in your investing style
- Battle harden your approach
- Stay the course

<https://t.co/2GbHeu8xcu>

9■ Mistakes Not to Make In A Bear Market

- Don't sell your winners too early
- If you invest during difficult times, do so with high conviction
- Not Diworsifying
- Avoid margin lending
- Not giving up my 'long-term market outlook' advantage

<https://t.co/FS2vqGEP5d>

■The Most Important Secular Trends And How To Play Them

- On-premise enterprise infrastructure to the cloud
- Physical payments to digital payments
- Physical commerce to e-commerce
- Linear TV to online content

<https://t.co/peHVt5gKW8>