Twitter Thread by Ram Bhupatiraju

Ram Bhupatiraju
@RamBhupatiraju

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