# Twitter Thread by WealthyVia

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## Mkt view :

**Only 290 companies trading above dec 2017 prices which was top of overall broader market. If one looks at nifty which is concentrated in 5 stocks, then it may scare them. Whereas individual stocks have yet lot of room to grow.**

In history of markets, when interest rates can not grow and remain so low for another 1 year minimum then stock prices are bound to soar.

How to play in current markets :
1. Debt free and low working capital companies ( as% of sales) with less receivable days and small cash conversion cycles . This ensures company always has money to operate n stay afloat.

2. High growth companies with above 1st condition. Top line of 10% plus and bottom line of 25% plus consistently with increasing or stable operating margins make the company do better in robustness of share price.

In such pandemic corona conditions or earlier demonetization, nbfc liquidity crunch, ilfs, small & midcap dwnfall from 2018: if all of these situations can not stop these companies then What will?

They remained robust and grew in profits and share prices. That's what we are choosing. If there is correction in stock price, it will never set a panic or regret, one would be willing to add n load it up. Only those are the companies worth buying.

with size of opportunity / available market to sell expanding for them. Where peer companies of theirs locally or globally are not able to compete with them in terms of margins, quality or scale

We have chosen Such 10-12 Companies where management is clear and working hard and smart on plans. "What is going to happen to their profits" Has very much clarity. Then question remains what investor is going to do about it?

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