

## Twitter Thread by [Liviam Capital](#)

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**A keep-it-simple long term growth portfolio that is hard to beat:**

**E-commerce: \$AMZN \$SE \$MELI \$SHOP**

**Fintech: \$PYPL \$SQ \$ADYEN \$V \$MA**

**Cloud: \$CRM \$NOW \$TEAM \$TWLO \$ADBE \$MSFT**

**Digital Ads: \$FB \$GOOG**

**Media: \$NFLX**

**Gambling: \$EVO**

**Consumer: \$AAPL**

**Semi: \$NVDA \$TSM \$ASML**