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