

## Twitter Thread by Sajal Kapoor



**Sajal Kapoor**

@unseenvalue



**Avoid low quality assets in a sector where price discovery has been relentless over many years. Stay with tier 1 players. Margin of safety is in business first and not the entry price. This is not valid for short term positional trades. Those are managed via strict stop losses.**

Speciality vs Commodity Chemicals

Speciality - typically bespoke solutions as per customer's requirements. High complexity. This makes continuous R&D and product innovation a key success factor!

Go to 2 hr 21 mins for my views on #Chemicals sector \U0001f447<https://t.co/Zzx6AwHZLH>

— Sajal Kapoor (@unseenvalue) June 15, 2020