Twitter Thread by Sajal Kapoor

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@unseenvalue

@ishmohit1 @soicfinance @punitbansal14 @nison_steve Both should do well. Prefer Zoetis for leadership, best in class margins and management's execution. Elanco should improve with Bayer Animal boosting companion proportion in its overall mix.

#SeQuent will under-perform next 1-2 years due to #ESOP (unless a surprise M&A happens)

