Twitter Thread by Conviction | Patience



Conviction | Patience
@unseenvalue

Paraphrasing @tusharbohra on @IIC_Conference today ::

"If 10 commodity companies are doing capex at the same time, it signals a peak. If 10 companies in Chemicals/API/Pharma are doing capex in different products at the same time - it probably signals the start of a New Era" ■■■■