

Twitter Thread by John Mihaljevic



John Mihaljevic

[@JMihaljevic](#)



Grateful to [@AswathDamodaran](#) for sharing his wisdom in this remarkable conversation with [@veiled_value](#) about the book, The Dark Side of Valuation.

Excerpts follow in this thread.

Members, access the full interview

On every investor's worst enemy:



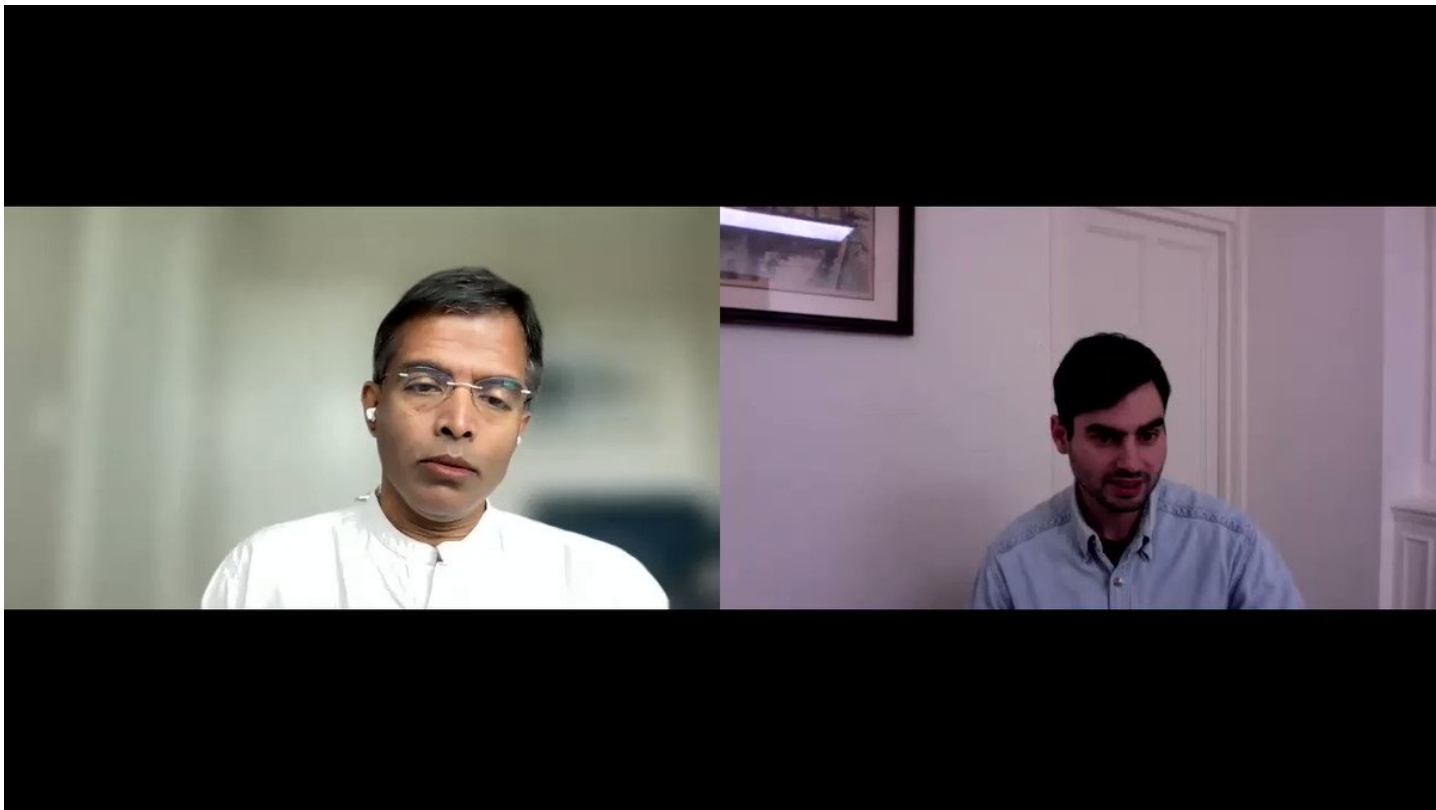
On uncertainty:



On multiples vs. DCF:



On stories and valuation:



On "circle of competence":



On copying Warren Buffett:



On quality management:



On ESG:

