

## 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:



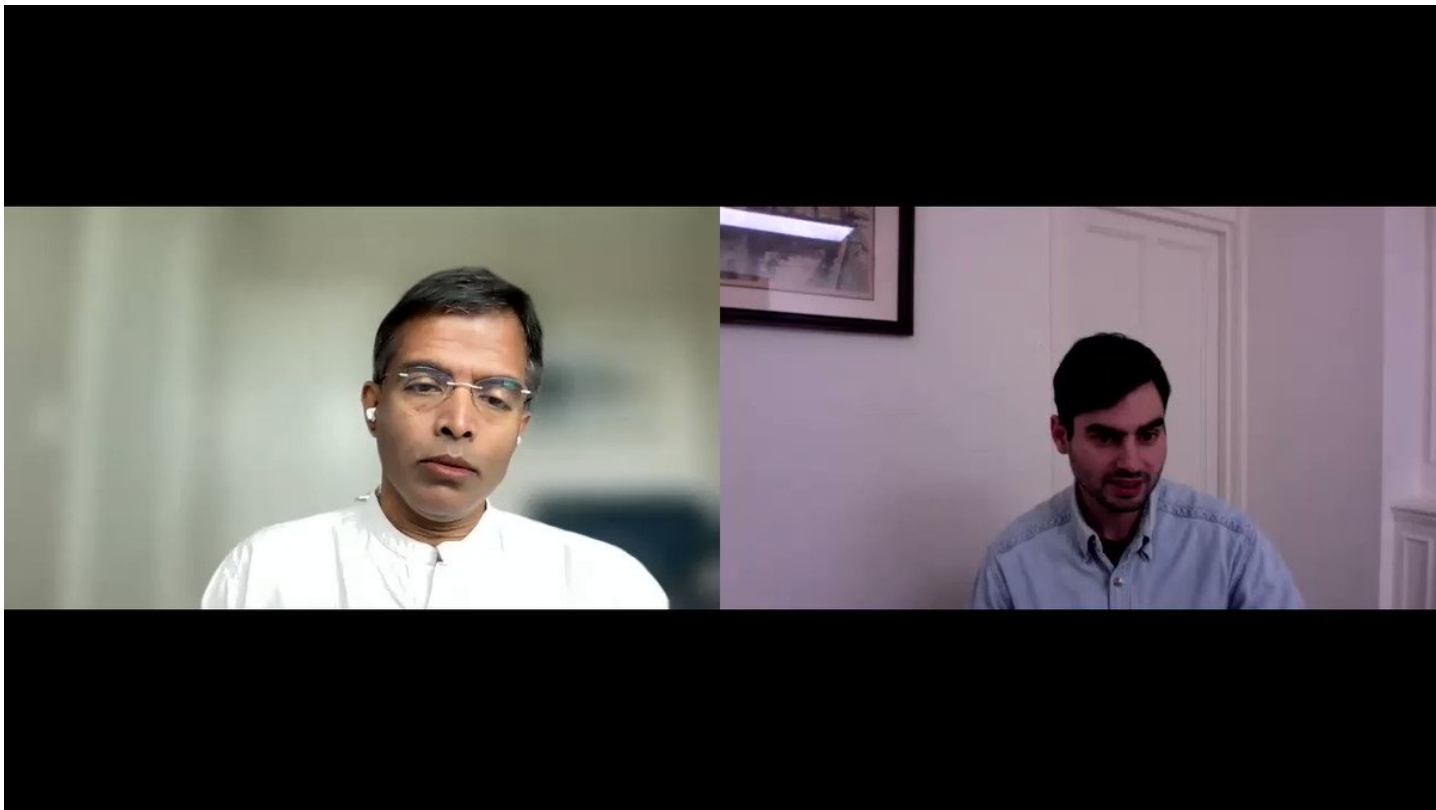
On uncertainty:



On multiples vs. DCF:



On stories and valuation:



On "circle of competence":



On copying Warren Buffett:



On quality management:



On ESG:

