

Twitter Thread by Intrinsic Compounding



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@soicfinance



Six key learnings from a friend/mentor in investing:-

- 1. Investing is a game of probabilities and not possibilities.**
- 2. Sizing is the most important decision that you make.**
- 3. Being a generalist and learning from sectoral experts is fun.**
- 4. Identify the key variables**

And learn how to probabilistically see how these variables move in the future.

5. Benchmark companies within a sector and then see which one is doing what, it will sooner or later reflect in financials.
6. Network as much as you can. Network is the modern day network.