

Twitter Thread by Ian Cassel



Ian Cassel

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Great post. Lots of similarities with how you invest and successful microcap investing. The first bet is about the broad strokes. The subsequent bets is when you see the details fill in and average up. Buy low and then don't be afraid to buy higher - sometimes aggressively.

Spoke to a group of students from London School of Economics this morning. So many great questions. As usual, multiple Qs gravitate around "how do you know?" Or how did you know or how could you know? It's the reason I wrote this. <https://t.co/aECMjlFwx0>

— Ho Nam (@honam) June 27, 2021