Twitter Thread by ishmohit

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Just the journey of Bajaj Finance proves it why it is difficult to hold businessess. People with different mindsets (technincals) or deep value kept making noise throughout the last 6 years.. business did what it had to do. Only very few I know have held it firmly

Holding the right business, it is increasingly becoming clear to me is the most difficult thing to do unless you write down your investing philosophy and know it in your bones