Twitter Thread by Ram Bhupatiraju

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Excellent 3 part series on the lessons complied from many Value Investing Books.■

Part 1■: The Mindset
✔■Think like an owner
✔■Patience is the greatest virtue
✔■Mr. Market – your friend, others' enemy
✔■Use your Rationality, not your

Part 2■:The Methodology
✔■Margin of safety and the quest for bargains
✔■A risk-averse philosophy and strategy
✔■Uncertainty is not risk
✔■The Dhandho Way: Heads, I win; tails, I don't lose much

https://t.co/hpz9jWbhIa

Part 3■: The Hunt
✔■The perfect business is not necessarily a sound investment
✔■The quantitative & qualitative assessment
✔■The quest for gold (good prices for good Businesses)
✔■Fish where the fish are
✔■Be conservative & know your circle of competence

https://t.co/JlyDmcyPFW

Value Investing is too often portrayed as just a hunt for statistical bargains. It encompasses a lot more that long-term investors can learn too - quest for quality, using the appropriate Valuation methods, patience, contrarianism, risk awareness, Volatility...