

# Twitter Thread by Ram Bhupatiraju

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**Excellent 3 part series on the lessons compiled 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/hpz9jWbhla>

## 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...