

# Twitter Thread by Meet Shah



**Meet Shah**

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## 2021 - Year End Mega-Thread.

### List of Books. Subscriptions. Newsletters. Websites. Stock Picking Patterns. Fund Managers, Businesses I Invested heavily, etc.

Books i love to re-read irrespective of market cycles:

- 1) The Snowball.  
(compounding)
- 2) You can be a stock market genius.  
(Special situation)
- 3) The Little book that builds wealth.  
(Moats)
- 4) Margin of Safety.  
(Valuation)
- 5) Black Swan.  
(High Improbable Events)
  
- 6) Zebra in the lion country.  
(Smallcap investing)
- 7) The investment checklist.  
(Imp of checklist)
- 8) Value Migration.  
(Mega Shifts in business landscape)
- 9) The Outsiders.  
(Capital Allocation)
- 10) Megatrends.  
(Trends of new world)
- 11) Poor Charlie's Almanack.  
(Mental Models)

Books on Indian Investing:

- 1) Masterclass with Super Investors.

(Collection of India's best stock market investors)

2) Bulls Bears & other Beasts.

(Brief history of Indian stock market)

3) India's Money Monarchs.

(Collection of India's best stock market veterans)

Reading Material from Global Investors:

1) BRK Annual Meetings Transcripts & Letters to shareholders.

2) Prem Watsa's Newsletters.

3) Howard Marks Memos.

4) LiLu Himalaya Capital.

5) Jeff Bezos Amazon.

6) Nomad Investment & Terry Smith's Newsletters. (Recently started reading)

Reading Material on Indian Investing:

1) Dr. Vijay Malik's Articles.

2) Safal Niveshak's Articles.

3) Motilal Oswal's Wealth Creation Studies.

4) Sanjay Bakshi's Articles & Videos.

5) Samit Vartak's Articles.

Additional Reading Newsletters:

1) The Motley Fool.

2) Farnam Street Newsletters.

3) MoneyLife Articles.

4) Marcellus Investment Newsletters.

5) Porinju Veliyath's Newsletters.

6) Seeking Alpha.

7) The Ken.

Reports & Websites:

1) B&K Securities - one of the best in the industry.

2) Spark Capital.

3) Ambit.

4) Phillip Capital.

5) Mosl Institutional Reports.

6) BSE/NSE Corporate Announcements.

7) IBEF.

8) BuffettFaq.

9) Ramesh Damani Chats. Transcripts on Rediff.

Viewing Library:

- 1) Mohnish Pabrai.
  - 2) The Knowledge Project.
  - 3) PPFAS.
  - 4) CFA Society.
  - 5) Alpha Moguls.
  - 6) Talks at Google.
  - 7) WealthTrack.
  - 8) The Investor's Podcast.
  - 9) Wizards of Dalal Street.
  - 10) Coffee Can Investing.
  - 11) PMS/AIF.
- One percent show.  
SOIC Videos.  
(Recent adds)

Fund Managers whom i closely track:

- 1) Malabar Investments - Sumeet Nagar.
- 2) Nalanda Capital - Pulak Prasad.
- 3) Equity Intelligence - Porinju Veliyath.
- 4) Sageone - Samit Vartak.
- 5) Unifi Capital - GMaran.

Advisors:

- 1) Niveshaay Investment Advisors - Arvind Kothari.  
(scuttlebutt)
- 2) Concept Investwell Securities - Siddharth Mandalaywala. (compounders and megatrends)

Patterns to generate investment ideas:

- 1) Megatrends  
(Renewables/Insurance/Diagnostics)
- 2) Demergers (Aarti Surf)
- 3) Management Change
- 4) Restructuring (Kirloskar Pneumatic)
- 5) Compounders at beaten valuations (United Spirits)
- 6) Hidden Gem Business/Intelligent Fanatics (Neogen)

Top Metrics:

- 1) Management Quality.
- 2) Business Quality.
- 3) Valuation.
- 4) Runway.
- 5) Allocation.

#### Subscription:

- 1) Screener.  
(Quick stock screening)
- 2) VCcircle.  
(PE/VC Deals)
- 3) Value Research's Magazines. (Tons of wisdom)
- 4) Safal Niveshak's Investing course.  
(One of the best in the industry)
- 5) Moneycontrol.
- 6) M&A Critique. (Deals)
- 7) Equitymaster.
- 8) Capitaliq.

#### Twitter Handles:

- 1) Ian Cassel.
- 2) Morgan Housel.
- 3) Dmuthuk.
- 4) Brian Feroldi.

#### Businesses where i allocated heavily in 2021:

- 1) Neogen Chemicals.
- 2) Sanghvi Movers.
- 3) Kingfa.
- 4) United Spirits.
- 5) Syngene.

#### Investing errors i made in this bull market:

- 1) Poor allocation in good stock.
- 2) Exiting early.