

Twitter Thread by [ishmohit](#)

[ishmohit](#)

[@ishmohit1](#)



The divergence that happened between 2017-2019 might be a thing of the past if the broader markets/sectors start doing well. Plenty of signs

I track cos bottoms up, seeing signs of massive capex announcements and growth expectations in Numerous cos. Whether it is spechem or cement cos like Dalmia. It's visible