

Twitter Thread by Intrinsic Compounding



Intrinsic Compounding

[@soicfinance](#)



[@sahil_vi](#) [@itsTarH](#) 1. Healthcare

2. CdmO/crams in Pharma and agro

3. Spechem

4. Music streaming

5. Building material

6. Exchanges

7. Ecommerce Businessess

8. Financialization

9. Niche Manufacturing due to cost arbitrage

10. Certain Auto anc cos with tie ups

11. Insurance space

12. Animal health

[@moatandvalue](#) [@sahil_vi](#) [@itsTarH](#) 13. Cybersecurity cos abroad. Not in India.

14. Digital transformation: digital is an overused word though.

15. Biotechnology: emerging theme. Waiting for it to play out.

16. Green energy: some players already benefitting