Twitter Thread by Sajal Kapoor

Sajal Kapoor
@unseenvalue

Private Equity is "smart money". They enter only when there is a potential to unlock value.

CVC Capital (#HCG)
Carlyle Group (#SeQuent)
#Biocon Biologics (True North)
KKR (in talks to buy a controlling stake in #JBChemicals & Pharmaceuticals)

| Smart money is after my holdings!

Healthcare is a big (correction : very big) opportunity with a multi-decadal growth runway looking at the demographics and decades of underinvestment in India.

Keep averaging-up as the business performs.

Not easy.

Capacity to suffer consolidation/underperformance is paramount.

Stock	Date	Action	Exchange	Qty.	Price#	Trade Value	Brokerage	Taxes (inclusive all charges)	Settlement No	Segment	DP ID-Client DP ID	eATM withheld amount	Cash withheld amount
HEAGLO	30-APR-2020	Buy										NA	0
HEAGLO	13-APR-2020	Buy										NA	0
HEAGLO	13-APR-2020	Buy										NA	0
HEAGLO	13-APR-2020	Buy										NA	0
HEAGLO	13-APR-2020	Buy										NA	0
HEAGLO	13-APR-2020	Buy										NA	0
HEAGLO	13-APR-2020	Buy										NA	0