Twitter Thread by John Mihaljevic

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Grateful to @AswathDamodaran for sharing his wisdom in this remarkable conversation with @veiled_value about the book, The Dark Side of Valuation.

Excerpts follow in this thread.
Members, access the full interview

On every investor's worst enemy:



On uncertainty:



On multiples vs. DCF:



On stories and valuation:



On "circle of competence":



On copying Warren Buffett:



On quality management:



On ESG:

