

Twitter Thread by The Rational Walk

The Rational Walk

[@rationalwalk](#)



The weakness of someone's investment thesis is highly correlated with how angry they get when someone dares to question the investment.

Investors who are confident in their positions do not care if someone disagrees or if the language they use to disagree is "insulting".

I can think of two groups of investors who generally get VERY, VERY angry when their investment is questioned.

One is a company run by a megalomaniac who claims to be saving the world and leading humanity to Mars.

The other was created by an anonymous person in January 2009.