

Focus

Six months ago, I left my role at a growth equity fund after learning from some exceptional people. The decision came from conviction in what I can do — paired with the modesty that capability often takes time to compound into visible results. So for now, I'm operating on belief.

I love investing, and I work hard. This site is where I publish my pitches, with a focus on finding No Brainers. I want to work on my simplicity, the first few pitches are long-reads, my hope is to simplify everything.

My initial hunting grounds will be

- a) Infrastructure & Cyber Businesses
- b) Small-Mid Cap Internet / Software Companies
- c) International Businesses, especially in emerging markets

You can also find them on my [substack](#).

I love investing. It's such a pure way to learn about the world, systems, and people. I am also blessed to have friends who I can chat with about these complicated constellations of people that use cash and time to generate *hopefully* even more cash. The universe of available companies can be daunting, and you need to start somewhere.

My background is in software, I primarily focused on infrastructure and vertical market software, as evidenced by the pitches on Confluent and Procore. However, this sector is fawned over by larger firms and teams where an individual investor has a harder time competing, not impossible just much harder.

Thus, I decided to think about the areas where this individual investor wasn't playing chess with Bobby Fischer. As most aimless investors I walked back to the classics ([Berkshire](#)) & "*Poor Charlie's Almanack*" – and one part lit up; "How do you get into these great companies...One method is what I'd call the method of finding them small – get 'em when they're little." Easy enough, we should start with smaller companies, larger funds can't put enough dollars to work in these companies so that's a clear place to start.