

Title: DFV Tweet - 11/3/20 - Game of thrones > HBO > WarnerMedia > AT&T; :> ■■■■

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Permalink: /r/TheGloryHodl/comments/tpv4pc/dfv_tweet_11320_game_of_thrones_hbo_warnermedia/

Url: /r/DeepFuckingValue/comments/qm414s/dfv_tweet_11320_game_of_thrones_hbo_warnermedia/

Linked Post Content:

513. 2020/11/03 06:34:51 https://twitter.com/TheRoaringKitty/status/1323634751861854211

<https://preview.redd.it/oodswnb1ifx71.png?width=610&format=png&auto=webp&s=ed91b6176e90251d65d2b2d5a937bee9117a88da>

Game of thrones.. not sure which episode. Scene with Bran.

GoT was such an epic show... I dug through the basic info to run down the production and distribution companies related to the show. Then read up on the parent companies of the parent companies. :(shit got long fast.

****Production companies**** seem boring but HBO Entertainment mainly. HBO is a subsidiary of Home Box Office, Inc. , which is a subsidiary of WarnerMedia Studios & Networks, one of the five main divisions of WarnerMedia, which is a subsidiary of AT&T.; (Planned merger between WarnerMedia and Discovery, Inc. to form Warner Bros. Discovery)

How HBO got owned by WarnerMedia:

* October 22, 2016, AT&T; announced an offer to acquire Time Warner for \$108.7 billion

https://www.chicagotribune.com/business/ct-att-time-warner-merger-20161022-story.html

* AT&T; Expands Strategic Relationship with Amazon Web Services

https://about.att.com/story/att_expands_relationship_we_aws.html

* June 14, 2018 merger closed removing TIME and renaming the unit WarnerMedia

* May 04, 2020 : https://about.att.com/story/2020/WarnerMedia_Ole_Communications.html

[Jus sayin. AT&T; heeey](https://preview.redd.it/eiwmhqs01gx71.png?width=586&format=png&auto=webp&s=034fe28022e2260d1f86735dd5ee3bb62e6f2b0a)

****Distributors**** were Warner Bros. Television Distribution , a subsidiary of WarnerMedia Sales & Distribution, one of the five main divisions of WarnerMedia, which is a subsidiary of AT&T.; (Planned merger between WarnerMedia and Discovery, Inc. to form Warner Bros. Discovery)

(:D copy pasta my own work)

WarnerMedia seems to have a pretty dominant stance to be honest. Current networks include :

- * Adult Swim
- * AT&T; SportsNet
- * Boomerang
- * Cartoon Network
- * Cartoonito
- * Cinemax
- * CNN
- * DC Comics
- * HBO

- * HBO Max
- * HLN
- * TBS
- * The CW (50% venture with ViacomCBS)
- * TNT
- * TruTV
- * Turner Classic Movies
- * Warner Bros.
- * Warner TV

So since HBO, Showtime, Warner Bro's, and Warnermedia are all subsidiaries of At&t;, Let's look at them. This one was actually quite simple as its the parent company of all entities mentioned. I threw that Discovery Inc. merger fact in there because of implied importance to the streaming and to the TV sector. Looking for Deeper Fucking Value's or FROG's.

[AT&T; -](https://fintel.io/so/us/t?d=2020-09-30) \$T

<https://preview.redd.it/nisq3ikvkfx71.png?width=1495&format;=png&auto;=webp&s;=85f19f9b608594f460d40b9b3842fbbb533ec15d>

Theres a chart for the time frame of the tweet. this would be the chart he would be seeing on the tweet date of 11/3/20. The peak in June was \$33.23 for reference. low of 28.51 as of 9/30.

<https://preview.redd.it/lhak7tatkfx71.png?width=1826&format;=png&auto;=webp&s;=b8983739f5bf7195eff8c4b45f9a2ce421303810>

Personally i think that seeing these numbers, fintel fucked this up. But im a stubborn ass player. So I'm going to just ignore fintel and go into the 13f's for these time frames. Because Fundamentals.

[**USAdvisors Wealth Management, LLC**](https://fintel.io/i/usadvisors-wealth-management) **when corrected didnt' show a frog. just bad accountants.**

[**HighTower Advisors, LLC**](https://fintel.io/i/hightower-advisors-llc)**■■■■**

<https://preview.redd.it/y6tfuvo4pfx71.png?width=1791&format;=png&auto;=webp&s;=b4fd62730e33c2ade46d9798563fc31e2e4a4fca>

<https://preview.redd.it/pn7ybgwlofx71.png?width=1349&format;=png&auto;=webp&s;=590f25f6ccbe9b9767e6b6339955e6ac0ebae3bc>

<https://preview.redd.it/zool23zzofx71.png?width=1326&format;=png&auto;=webp&s;=43115d771e52bd27a57d103055c46fcc4ec6bdeb>

[**Sowell Financial Services LLC**](https://fintel.io/i/sowell-financial-services) **had nothing strange at all.**

[**Whalerock Point Partners, Llc**](https://fintel.io/i/whalerock-point-partners-llc)

<https://preview.redd.it/f3xvo4ccmfx71.png?width=1774&format;=png&auto;=webp&s;=2a170ae8e12ab5625ee89c57efe52392f4892c03>

<https://preview.redd.it/mjs3w025mfx71.png?width=1287&format;=png&auto;=webp&s;=e57d924796aa75c97b8c527adb4c0d59b35a6f54>

Naysayers be like... fintel's wrong. so let's adjust.

[thats neat](https://preview.redd.it/g8r9nlpnfx71.png?width=1279&format=png&auto=webp&s=3eb6b2fd0005b8c371ff32a19d5ac117e0fb103d)

Now please carry on to explain what the fuck that is. K thnx. NO matter which way its a what the fuck..■

[PEAK6 Investments LLC](https://fintel.io/i/peak6-investments1)

Now these guys had a weird thing i noticed. Why position with 1.5m calls, and then 1.2m calls, if they're not going to get assigned? They never owned the shares to create these positions.... wutfukdoing PEAK6? Other than that I couldn't find a discrepancy

https://preview.redd.it/c39u40pzufx71.png?width=1764&format=png&auto=webp&s=0a3171fc595b66f94a73e66482b38b539995087c

So that shit. numbers numbers numbers. Checking their 8-K's at the time, i noticed what bond notes they got out at the time, good ole AT&T.;

https://preview.redd.it/n4q6w3wdwfx71.png?width=783&format=png&auto=webp&s=c20445e8b9cbd19b9b5497a53541f27932af7f55

Not going to dig far enough into those underwriters yet. Thats the master post.
heres the financials for AT&T; 2020 v 2019 to show that they were down across the board for covid

https://preview.redd.it/batswe2twfx71.png?width=983&format=png&auto=webp&s=4321e0d0436522d034eafac2525e3c0b29c454d5

Fuckin Fundamentals man. That 10-Q (quarterly financial report) can be found
[here](https://www.sec.gov/ix?doc=/Archives/edgar/data/732717/000156276220000279/T2q2010q.htm)

NERD NOTES : AT&T; has a partnership with amazon. yee.

1 https://about.att.com/story/att_expands_relationship_we_aws.html

2 https://www.cnbc.com/2021/07/19/dish-and-atts-new-wireless-partnership-potentially-foreshadows-directv-deal.html(interesting read) states :

" [AT&T;](https://www.cnbc.com/quotes/T) [is replacing T-Mobile as Dish Network's primary network services partner](https://www.cnbc.com/2021/07/19/dish-and-att-sign-wireless-network-deal-worth-at-least-5-billion.html), bringing the wireless company closer to the satellite TV provider it nearly acquired almost 15 years ago and potentially increasing the likelihood of a Dish-DirectTV merger.

[According to people familiar with the matter](https://www.bloomberg.com/news/articles/2014-10-23/goldman-citigroup-said-wary-of-ergen-as-he-mulls-t-mobile-bid?sref=ctSjKj2N),

[Dish](https://www.cnbc.com/quotes/DISH) founder and billionaire Charlie Ergen reached the final stages of selling his company to AT&T; in 2007. When he pushed for a last-minute change in terms, the deal fell apart.

Since then, [AT&T;](https://www.cnbc.com/quotes/T) has acquired -- and subsequently agreed to divest (at least partially) -- DirecTV and WarnerMedia for more than \$167 billion, including debt. This year, AT&T; sold a 30% stake in its pay-TV operations, including DirecTV, to private equity firm TPG [and formed a new company.](https://www.cnbc.com/video/2021/02/25/att-tpg-to-form-new-company-named-directv.html)

Three months later, AT&T; [announced plans to spin off WarnerMedia](<https://www.cnbc.com/2021/05/17/att-ceo-stankeys-biggest-corporate-reversal-in-history-rejects-stephenson.html>), for which it paid more than \$100 billion in 2018.

Dish has discussed offering wireless service to compete with AT&T;, [Verizon](<https://www.cnbc.com/quotes/VZ>) and [T-Mobile](<https://www.cnbc.com/quotes/TMUS>) for more than a decade. Ergen capitalized on an opening to get government support as a fourth competitor when [T-Mobile and Sprint merged last year.](<https://www.t-mobile.com/news/un-carrier/t-mobile-sprint-one-company>)"

So yeah. Nother FROG related tweet imho. :[#513 in THIS list.](https://www.reddit.com/r/DeepFuckingValue/comments/qjh0n4/list_of_dfv_tweets_i_found_powerups_in/)

Knowledge is Power

POWER to the PLAYERS

\-Always sad but truthful