

Title: Ryan Cohen's Master Plan

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EDIT: New throwaway account, I can't post to the bigger sub so feel free to share this there if you have posting privileges.

Here's the link to the full article that the Munger quote is from:

[https://www.cnbc.com/2020/02/14/charlie-munger-shares-opinion-of-tesla-ceo-elon-musk.html?__source=twitter%7Cmain](https://www.cnbc.com/2020/02/14/charlie-munger-shares-opinion-of-tesla-ceo-elon-musk.html?__source=twitter%7Cmain)

I think RC's trying to lay out the plan for the next few weeks with this. Let's take a look at the entire quote from Munger and the rest of the article:

>Owning Tesla stock has been a bit of a roller coaster ride as of late: During the first week of February, for example, the stock had “one of its wildest weeks ever,” [CNBC reported](<https://www.cnbc.com/2020/02/06/tesla-becomes-top-holding-on-sofi-as-young-investors-clamor-into-stock.html>), with the share price “swinging hundreds of dollars in both directions.”

GME is going to have a volatile week in the lead up to the MOASS, Ryan does not want us to paperhand if the stock swings up or down by hundreds of dollars.

>“My thoughts are two,” Munger, who serves as the Journal’s chairman replied. “I would never buy [Tesla], and I would never sell it short,” he said, referring to a technique investors use to bet that a stock will decline.

This speaks for itself. Shorts are boned.

>At the Daily Journal’s 2019 shareholder meeting, Munger shared similar thoughts, but also said that he personally [would not hire](<https://www.cnbc.com/2019/02/19/charlie-munger-ideal-hire-wouldnt-be-someone-like-elon-musk.html>) Musk.

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>“I want the guy who understands his limitations instead of the guy who doesn’t,” Munger said at the time.

***“On the other hand, I’ve learned something terribly important in life.... These weird guys who overestimate themselves occasionally knock it right out of the park.”**

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>***“I don’t want my personal life to be [around] a bunch of guys who are living in a state of delusion, who happen occasionally to win big. I want the prudent person,” Munger explained.**

This part is where it gets interesting. ***“Weird guys who occasionally knock it right out of the park”** is probably one of the most apt descriptions you could give to Apes, DFV, and, earlier in the year, WSB. This basically feels like RC is confirming that we're gonna knock it out of the park during the MOASS.

>***“I don’t want my personal life to be [around] a bunch of guys who are living in a state of delusion, who happen occasionally to win big. I want the prudent person,” Munger explained.**

This feels to me like a suggestion on the future of GME, as a stock and as a company. After the MOASS, RC wants prudent Apes to come back and reinvest in the company, not just act as degenerate gamblers who take their winnings and bail.

What do you think? Does this seem possible or am I reading tea-leaves and trying to make something out of nothing? Interested in hearing this sub's thoughts.