

Title: Bed Bath and Beyond / Ryan Cohen

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The below is pure speculation from a dumb ape.

Commenting on Bed Bath and Beyond. Ryan Cohen is a genius and continues to pay 5D chess. I walked into a BBBY store for the first time in several years, since before Covid.

They have made some major changes to their store design with new signage, new decor that emphasizes clean lines, simple design and straight forward appearance.

Store layout and aisles are easy to maneuver through, much less cluttered than in the past.

It looks like they are back to focusing on selling their core products and items, they used to sell a lot of extra useless junk that just made the store look messy, cheap and confusing. Reduced and less inventory on the shelves. Core items only is a smart move. Back to basics.

I assume these changes took place over the last few years. Before RC obviously. So upper management made some positive strategic moves. I have read the DD where it is believed that bad actors had infiltrated the board. I don't know how to reconcile the bad actors theory with the positive changes that I saw. Maybe they are unrelated.

Bottom line, why am I running on about all this you ask? I think RC recognized a unique opportunity and market with BBBY where maybe they are on the verge of a turnaround and just need an extra push that only he can provide.

People like shopping, people like buying, it's a social activity, they like to see, touch and feel before purchasing, it's something to do with friends and family, a reason to get together and be together. Online shopping is overrated! Brick and Mortar is alive and well!

Again I am an ape and not a smart one. I am what they call wrinkle-less. That might be my new flair. NFA.