SOIC PEER TO PEER

MICROFINANCE--- STAGE 2---UJJIVAN AND ARMAAN GOOD

AGROCHEMICAL ----STAGE 4 ---ASTEC, SHARDA CROPCHEM---GOOD DHANUKA AGROTECH, INSECTISIDE INDIA

ANGEL ONE----GAINED MARKET SHARE---BROKER

NCC AND ITD CEMENATION-------GOOD INFRA COMPANIES BUT PSP BAD

INDIGO GOOD -----AIRLINES INDUSTRY

WAREE ENERGY—SOLAR PANEL---

NEULAND GOOD AND SUVEN PHARMA BAD

WEALTH MANAGEMEMT

NUVAMA -- GOOD

ANANDRATHI—GOOD

360 ONE—NOT GOOD

BANK

BANDHAN BANK---BAD

UJJIVAN—STAGE 2

ARMAAN – STAGE 2

Price to sales

Newgen ---good to keep and buy

Intellect design arena----good

Sharda motors----good

Best agro –avoid and time techno plast –good

Dabur bad and vbl good

Gpil good and shyam metallics bad

Aarti industries good and neogen bad

Real estate

Prestige good

Jewellery

Kalayn good…titan and senco next good company

Hospital—PE DIFFERNCE AS NH HAS HOSPITAL IN CAYMAN ISLANDS

NH PE 35/Kims PE 47/Max health care PE 72

AARTI PHARMA LABS----GOOD THAN AARTI DRGS

GAEL --GUJARAT AMBUJA EXPORTS ---GOOD AS COMPETITOR ARE LESS NOW

TRIVENI GOOD BUT GMM

QUESTIONS

USHA MARTIN VS BHARAT WIRE

ABANTI FEEDS GOOD

Stocks 2024

Reasonable valuation Sector

Banks PE lowest ever

Avoid

Jupiter wagon/ titagarh/ rk forge/bhart forge