

My Highest Conviction Pick and Other Links

[% oldschooLvalue.com/blog/reading-links/my-highest-conviction-pick-and-other-links/](http://oldschoolvalue.com/blog/reading-links/my-highest-conviction-pick-and-other-links/)

Written by Jae Jun

[Comments \(8\)](#)

Great investment reads that range from my highest conviction stock pick to Greece and the economy and several fund managers letter to shareholders. In volatile markets such as what we are having now, it is important to take note of both the top down and bottom up analysis. These links will help you gain further knowledge on how things may turn out in the future with the Greece and possibly now Italy problems.

[Table of Contents](#)

[Dacha Capital: A Discussion With Patrick Wong](#)

My highest conviction pick of the year. Dacha Capital, a rare earth holding company. This interview goes over Dacha's unique business model and approach.

[Groupon: Comedy or Drama?](#)

Who does Groupon think they are fooling with their horrible financials?

[Wild Things](#)

Many people have profited and lost money by investing in commodities but what makes you think you can profit from the decade long commodity boom?

[Gary Shilling's Seven Faces Of Deflation](#)

Gary Shilling puts forward his argument that deflation is already here.

[Adrian Day's Portfolio Review Q2 2011](#)

I posted this up on [Facebook](#) and [Google+](#) but if you missed it, Adrian Day is fast becoming my favorite portfolio manager. The guy has vast experience and knowledge in the commodities sector and I like his international picks.

[Commentary on The Oakmark Funds](#)

David Herro of Oakmark Funds offers his opinion on Greece.

[Einhorn Greenlight Capital Letter Q2 2011](#)

David Einhorn's letter to shareholders. Talks about the economy, his buys and sells.

