



Remember

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*If I'm buyin somethin' because everybody else is buyin' it
And telling me that the money flow will keep the market hyper
It's time to remind myself of the story of the rats
That followed a strange guy they called the Pied Piper*

*If we think small caps, NBFCs and Housing Finance
Are the sure things to keep goin' up, thanks to liquidity
Folks used to think the same way in 2007, and before that in 1999
About stocks in construction, and in IT*

*When you hear that it's a new world and the old rules don't matter
'tis time to remember the words of this gent
A giant, he was, they called him John Templeton,
And he said "the four most expensive words are – This time it's different"*

*When we buy groceries, and when we buy fruit
We are considered smart when we find a bargain
Why the hell then, when we choose to buy shares
We only think of jumping on to the gravy train?*

*When a stock goes sharply up, we sure feel good
We feel like flying, and grin with glee,
The ground under us tells us to have a good look at it
And think of fundamentals, and of PE*

*Before I sound too much like a prophet of doom
I want to make sure to clear that nagging doubt
The idea is not to zig when everybody zags
Just urging you to spread your risk out*

*Almost everyone will rise some day, and so will they fall
When that happens, we don't want to get beat
Think of it as buying an umbrella in summer
When the rains suddenly come, we'll have steadier feet*