Animal Spirits Episode 26: The Collaborative Podcast

On this week's Animal Spirits with Michael & Ben, we welcomed on our first ever guest host, Morgan Housel from Collaborative Fund. The three of us discussed:

- Who should invest in private companies?
- How in the world do you pick top quartile venture capital funds?
- Is it possible to invest privately using quantitative tools?
- The overused finance phrases we find the most annoying.
- What if Tesla was a private company?
- What if Uber was a public company?
- Finance professionals vs. technology professionals.
- How is it possible Netflix is worth as much as Disney?
- Amazon or Walmart?
- How do you explain money management to someone who doesn't know anything about managing money?
- Is the Bezos shareholder letter the new Buffett shareholder letter?
- Why good news is gradual but bad news is an event & much more.

Listen here:

Stories mentioned:

- Some finance phrases I find annoying
- Stupid things finance people say
- The truth is catching up with Tesla
- Back to the drawing board for Tesla
- Tesla halts Model 3 production again
- Netflix hasn't found an expectation it can't beat
- Let's get real about Netflix's numbers
- Amazon 2018 shareholder letter
- I have millions and I know nothing about money

Charts mentioned:

Books mentioned:

- Factfulness by Hans Roling
- To Sell is Human by Daniel Pink
- Rocket Men by Robert Kurson
- Innumeracy by John Allen Poulos

Podcasts mentioned:

- Joel Greenblatt with Barry Ritholtz

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