



Rohith Potti

Private Investor



Non-linear Nature of Velocity

Asian Investing Summit 2019,
Hosted by MOI Global

David and Goliath



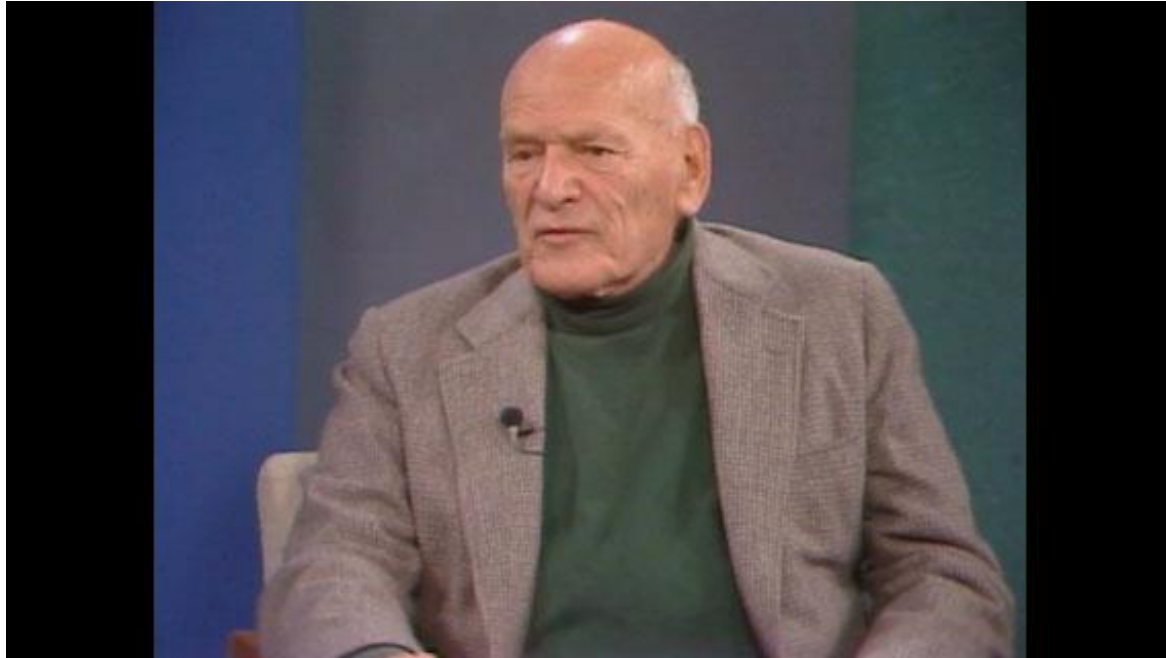
Our Hero - The Pebble



Aim and Speed = Velocity

Kinetic Energy = $(1/2) * (\text{mass}) * (\text{velocity}^2)$

Joseph Tussman



“What the pupil must learn, if he learns anything at all, is that the world will do most of the work for you, provided you cooperate with it by identifying how it really works and aligning with those realities.”

Aravind Eye Care



ARAVIND

EYE CARE SYSTEM

Dr. V



Intelligence and capability are not enough. There must be the joy of doing something beautiful.

Dr. Govindappa Venkataswamy



**THE MAN WHO SAVED MILLIONS OF
EYES...**

Needless Blindness - Cataract

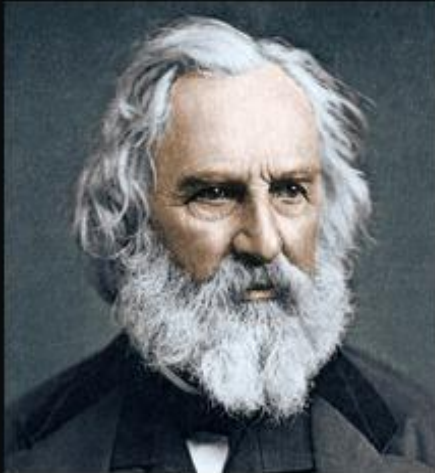


Aravind is Born



Working Hard

Henry Wadsworth Longfellow



The heights by great men
reached and kept were not
attained by sudden flight, but
they, while their companions
slept, were toiling upward in the
night.

AZ QUOTES

Compound Interest

Compound Interest Formula (including Principal)

Amount

Interest Rate (decimal)

$$A = P \left(1 + \frac{r}{n} \right)^{nt}$$

Time (years)

Principal

Number of times interest
is compounded per year

McDonaldization of Eyecare



“See, McDonald’s concept is simple. They feel they can train people all over the world irrespective of different religions, cultures, all those things to produce a product in the same way and deliver it in the same manner in hundreds of places. Supposing I am able to produce eye care – techniques, methods, all those things in the same way and make it available in every corner of the world, the problem of blindness is gone.” - Dr. V

Burgers= Cataract?



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Assembly Line

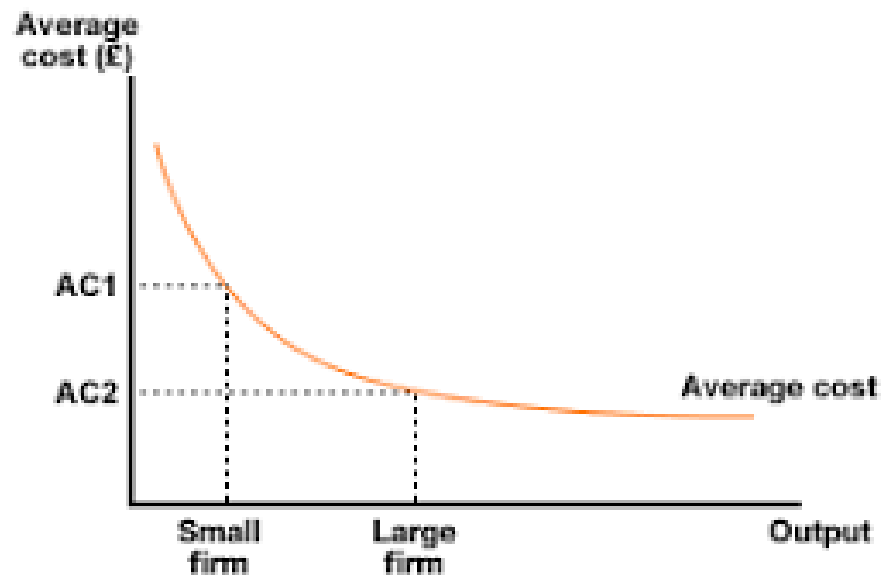
	Scenario A: One patient in the operating room at a time	Scenario B: Two patients in the operating room at any given time
Surgeon	1	1
Tables	1	2
Scrub nurses	1	2
Instrument sets	1	6
Surgeries per hour	1	6-8

Experience Curve

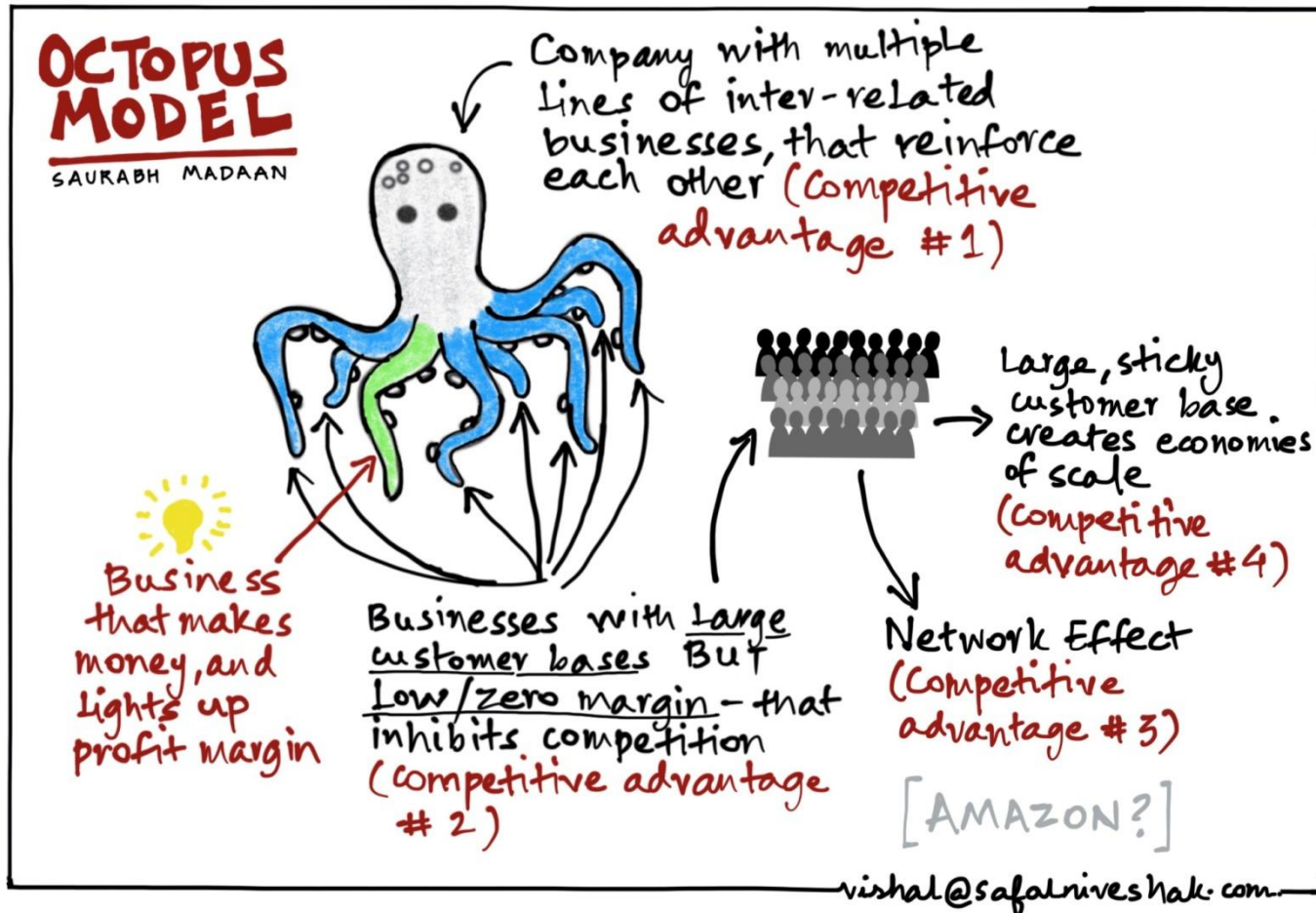


“Just doing something complicated in more and more volume enables human beings, who are trying to improve and are motivated by the incentives of capitalism, to do it more and more efficiently... The very nature of things is that if you get a whole lot of volume through your joint you get better at processing that volume. That is an enormous advantage. And it has a lot to do with which businesses succeed and fail.”

Economies of Scale



Octopus Business Model



An illustration of Octopus Mental Model from Safal Niveshak

End Result



Velocity vs Speed

- Velocity has direction; speed does not
- Velocity for one could be speed for the other

Conditions that Maximize Velocity

- Decentralized operations
- Redundancy
- Culture of Customer obsession
- Balance sheet strength
- Deep knowledge of your niche

Decentralization



Source: Intelligent Fanatics Project

Redundancy



Insurance operations are overstaffed in an upturn but are utilized in an downturn

Culture of Customer obsession



CERA

Balance Sheet Strength and Deep Expertise in the Niche



Resources

Websites :

<https://community.intelligentfanatics.com>

<https://www.aravind.org/default/Index/default>

Books: Infinite Vision, The Consolidators

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