Behind the Balance Sheet

Media kit

Business

About the show

We deconstruct the performance of world beating investors. A former Tiger Cub hedge fund partner interviews top hedge fund & long only managers & leading commentators. Past guests include John Armitage, Mario Gabelli & Bill Nygren. We explore how professionals analyse & value businesses, capital cycles, forensic accounting, pick stocks, construct portfolios, generate alpha & manage risk. For private investors, analysts, PMs & students who want serious financial education, sharper investing insights & to master equity research, fundamental analysis & value investing. https://bit.ly/btbspod

From the feed

Episodes
72

In the last 90 days
3 episodes

First episode
Aug 9, 2021

Latest episode
Nov 13, 2026

Hosts
Stephen clapham

Recent episodes

- #65 - The Tech Analyst - Benedict Evans explains Anthropic's economics (Nov 13, 2026)
- #64 - The Value Disciple: Tobias Carlisle on Buffett's 3 best deals and why value will come back into favour (Oct 15, 2026)
- #63 - The Fool: David Gardner explains his philosophy of buying stocks at high valuations after they have gone up a lot (Sep 17, 2026)
- #62 - The Gentleman Activist: Alex Roepers explains how he extracts better stock performance from overlooked mid-caps (Aug 20, 2026)
- #61 - Mr Common Sense - Rich Pzena on how to build an $80bn deep value firm, survive 60% underperformance and buy stocks on under 10x normalised earnings. (Jul 16, 2026)

Facts from the feed are read by PodSubs. The show has not added its own details yet.

The show on PodSubs: https://podsubs.com/show/behind-the-balance-she-4149344