



NEWS

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Lateef Investment Management Becomes TCM – Tran Capital Management

SAN RAFAEL, CA – Bay Area investment management company Lateef Investment Management announced its renaming today to TCM - Tran Capital Management. TCM, which specializes in concentrated stock portfolios of U.S. growth companies, was founded in 1974 and purchased in a management buyout in 2017 by Quoc Tran, Chief Investment Officer, and Eric Winterhalter, President. In the four years since that purchase, the firm has experienced a turnaround in investment performance and profitability.

“Becoming Tran Capital Management is a recognition of the hard work and accomplishments of our team as well as the aspirations of our organization to deliver on behalf of our clients in the dynamic capital markets of today and tomorrow,” said TCM Chief Investment Officer Quoc Tran. “Ours is a different kind of firm with a high functioning, collaborative, diverse, and sustainable investment culture.”

TCM manages concentrated equity strategies for institutions and high net worth investors following a growth at a reasonable price, or GARP, style. The four-member investment team manages the Multi-Cap Growth Strategy, the Partners Strategy, and the Focused Sustainable Growth Fund, delivering attractive levels of excess return relative to benchmarks and peers since the buyout and reorganization.

“By design, our firm is scaled to be flexible and nimble, capable of generating alpha by investing in a limited number of companies across the capitalization spectrum,” said President Eric Winterhalter. “Our goal is to generate exceptional returns for a select group of clients, though not to amass an excessive amount of assets under management that would undermine our ability to perform.”

The firm views diversity and sustainability as critical dimensions to its business and the companies it invests in for the benefit of clients.

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