

For forty years, Thomas White International and its predecessors have developed and improved a series of successful industry-specific valuation methods.

1970-1976

Thomas White & Associates, a private investment partnership, develops a valuation approach to stock selection.



1976

Thomas White meets Sir John Templeton at his office in Nassau, Bahamas to discuss their styles of value investing. Tom adjusts his valuation publication to John Templeton's specifications.

1978

Thomas White begins managing a portion of Sir John's offshore mutual fund. This continues until 1999.



1978-1992

The monthly valuation reports continue to be improved. Sir John and Thomas White's analysts use this research over this period.

1979-1992

Thomas White joins Morgan Stanley & Co., becoming CIO of the U.S. institutional value-style product, and later a Managing Director.



1992

Thomas White International and its research arm, The Global Capital Institute (GCI), are founded in Chicago. Clientele for GCI's research publication, grow by word of mouth.

1992-1994

U.S. publications are split to cover the Russell large-caps and the Russell small-caps. New Japanese and European publications are added to the GCI All-Country World edition.



1994

Thomas White launches its first international mutual fund in June.

1998

After three years of research in the area, GCI adds monthly valuations of emerging market companies.



1999

Thomas White adds a domestic mutual fund.

2000

GCI creates its own domestic and international style indices and produces suggested style model portfolios. These include nine in the U.S. and twelve internationally.



2002

GCI is asked to provide its research to the retail investor via the Global Research Settlement.

2006

Thomas White International establishes a presence in Asia by opening its Bangalore, India office.



2009

Thomas White International provides coverage of over 3000 companies in 45 countries worldwide.



2010

After 15 years of research in the area, Thomas White unveils an emerging markets fund.



THOMAS WHITE INTERNATIONAL
Capturing Value WorldwideSM

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