

## MEDIA RELEASE

22/2/2024

### La Trobe Financial assessed “Superior” by leading independent research house

La Trobe Financial, Australia’s leading alternative asset manager, is pleased to confirm that its “Superior” operational capability has been affirmed by the highly-regarded Foresight Analytics.

La Trobe Financial’s Chief Investment Officer Chris Paton commented, “We are proud to have been assessed as having a ‘Superior’ operational capability by one of Australia’s leading research houses. This ongoing endorsement from Foresight Analytics recognises our commitment to providing the highest standard of credit and investment disciplines across the business. As responsible stewards of almost 100,000<sup>+</sup> investors hard earned wealth, we continue to develop our people, processes and platform for the benefit of our investors.”

Jay Kumar, Foresight Analytics Founding Director and Chief Analyst, commented that the Superior operational capability rating “reflects the ongoing investment of the La Trobe Financial group in its human resources and risk and compliance practices, in addition to the ongoing financial backing from Brookfield Asset Management and a further strengthening in corporate financial performance. The Superior assessment is underpinned by La Trobe Financial’s ability to grow. With funds under management almost doubling over the last three years, it represents one of the fastest-growing funds in Australia. The Fund is well positioned for future growth whilst maintaining investment performance and preserving investor capital and redemption liquidity.”

A superior operational due diligence rating is the highest available from Foresight Analytics, and reflects the superior capacity of an operating party to perform its operational role and assist the fund in meeting its financial obligations promptly.

This rating follows La Trobe Financial’s 12 Month Term Account - one of the highest rated and most awarded strategies in its asset class<sup>†</sup> - being named Australia’s “Best Credit Fund – Mortgages”, by *Money* magazine for the 15th consecutive year.

Read the Foresight Analytics report [here](#) or learn more about the La Trobe Australian Credit Fund and view the latest rates [here](#).

For all media enquires please contact:

**Viran Azad** +61 437 123 880

#### About La Trobe Financial

La Trobe Financial is Australia’s leading alternative asset manager and a proven and trusted investment partner for institutional and retail investors with c. A\$18 billion AUM.

Established in 1952, La Trobe Financial has been building the wealth of its investors across seven decades through careful attention to quality, discipline and consistent performance across the economic cycle.

Today, La Trobe Financial manages assets on behalf of almost 100,000<sup>^</sup> investors – including some of the world's largest financial institutions – and over 3,500 supporting financial advisers.

La Trobe Financial's retail asset management business is spearheaded by the \$10bn Credit Fund, the largest retail credit fund across Australia. Its flagship 12 Month Term Account has been recognised as "Best Credit Fund – Mortgages" for 15 consecutive years by *Money* magazine, and was Australia's fastest growing fund (per Rainmaker) across the Australian asset management industry in the 12 months to 31 May 2023.

To find out more visit [www.latrobefinancial.com.au](http://www.latrobefinancial.com.au)

## **Disclaimer**

La Trobe Financial is regulated by the Australian Securities & Investments Commission (ASIC) and holds the requisite regulatory AFSL and ACL to operate the Credit Fund, place RMBS issuances, and provide credit services. To the extent that any statement constitutes financial product advice, that advice is general advice only and has been prepared without considering your objectives, financial situation or needs.

La Trobe Financial Asset Management Limited ACN 007 332 363 Australian Financial Services Licence 222213 Australian Credit Licence 222213 is the responsible entity of the La Trobe Australian Credit Fund ARSN 088 178 321. It is important for you to consider the Product Disclosure Statement for the Credit Fund in deciding whether to invest, or to continue to invest, in the Credit Fund. You can read the PDS and Target Market Determinations on our website [www.latrobefinancial.com](http://www.latrobefinancial.com), or ask for a copy by calling us on 1800 818 818.

<sup>^</sup> Total investors is calculated by adding all individual & joint investors (which includes some investors with a current zero balance in their account) to reasonable estimates of investors investing via platform, trusts or SMSFs.

La Trobe Financial Services Pty Limited ACN 006 479 527 Australian Credit Licence 392385.

Past performance is not a reliable indicator of future performance.

To view our Awards and Ratings please visit the Awards and Ratings page on our [website](#).