

## **MEDIA RELEASE**

20th November 2024

### **La Trobe Australian Credit Fund – 12 Month Term Account affirmed as “Recommended” by Lonsec**

La Trobe Financial, Australia's premier alternative asset manager, is proud to announce that its flagship La Trobe Australian Credit Fund 12 Month Term Account has once again been rated ‘Recommended’+ by leading independent ratings agency, Lonsec. This marks the thirteenth consecutive year the fund has received the rating.

The Lonsec rating is a testament to the Fund’s strong track record of delivering low-volatility, consistent monthly income to investors across all market cycles. The 12 Month Term Account has garnered recognition for its resilience and ability to consistently meet its objectives while providing strong risk-adjusted returns.

Chris Paton, La Trobe Financial’s Chief Investment Officer, expressed his pride in the continued recognition: *“Having Lonsec review the fund and once again deem it ‘Recommended’ is an honour and a testament to the focus we place on delivering low-volatility, consistent monthly income for our investors. This recognition highlights the resilience and longevity of the fund's performance, and we remain committed to maintaining the highest standards of investment discipline.”*

According to the Lonsec report, the Fund executes a structured and robust credit approval process executed by a well-regarded team. It also highlighted that the 12 month Term Account’s structure is designed to mitigate risks of asset/liability mismatch.

Since its inception, the La Trobe Australian Credit Fund 12 Month Term Account has been a trusted investment vehicle for Australians seeking reliable, low-volatility returns. The ‘Recommended’+ rating from Lonsec further solidifies the Fund’s position as a leader in the Australian credit market.

Learn more about the La Trobe Australian Credit Fund and view the latest rates [here](#).

#### **Contact:**

Viran Azad - Head of Events, Sponsorships & PR

+61 437 123 880

#### **About La Trobe Financial**

La Trobe Financial is Australia’s premier alternative asset manager and a proven and trusted investment partner for institutional and retail investors with over A\$20 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 over 100,000 investors<sup>^</sup> – including some of the world’s largest financial institutions – and 3,800 supporting financial advisers.

La Trobe Financial’s retail asset management business is spearheaded by the nearly \$12bn 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 is consistently recognised as one of Australia’s fastest growing funds (per Rainmaker) across the Australian wealth management industry.\*

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

#### **Disclaimer – La Trobe Financial**

La Trobe Financial is regulated by the Australian Securities & Investments Commission (ASIC) and holds the requisite regulatory AFSL and ACL to operate managed investment schemes, place RMBS issuances, and provide credit services.

La Trobe Financial Asset Management Limited ACN 007 332 363 Australian Financial Services Licence No. 222213 Australian Credit Licence No. 222213 is the responsible entity of the La Trobe Australian Credit Fund ARSN 088 178 321. It is important that you consider the Product Disclosure Statement (**PDS**) when deciding whether to invest or continue to invest in the fund. The PDS and Target Market Determinations are available on our website.

<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.

Past performance is not a reliable indicator of future performance.

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

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

+The rating published on 11/2024 for (12 Month Term Account) is issued by Lonsec Research Pty Ltd ABN 11 151 658 561 AFSL 421 445 (Lonsec Research). Ratings are general advice only and have been prepared without taking account of investors’ objectives, financial situation or needs. Consider your personal circumstances, read the product disclosure statement and seek independent financial advice before investing. The rating is not a recommendation to purchase, sell or hold any product. Past performance information is not indicative of future performance. Ratings are subject to change without notice and Lonsec Research assumes no obligation to update. Lonsec Research uses objective criteria and receives a fee from the Fund Manager. Visit [lonsec.com.au](http://lonsec.com.au) for ratings information and to access the full report. © 2024 Lonsec. All rights reserved.

Any financial product advice is general only and has been prepared without considering your objectives, financial situation or needs. You should, before investing or continuing to invest in the La Trobe Australian Credit Fund, consider the appropriateness of the advice having regard to your objectives, financial situation or needs and obtain and consider the Product Disclosure Statement for the fund.