

MEDIA RELEASE

14/3/24

La Trobe Financial named Australia's Best Investment Management Team for fifth year in a row

The highly disciplined investment team at La Trobe Financial has for the for the fifth consecutive year been awarded 'Best Investment Management Team - Australia' by Capital Finance International (CFI.co).

With \$19 billion in assets under management, the award highlights La Trobe Financial's position as Australia's premier alternative asset manager.

With a legacy of over 70 years and investments managed on behalf of major institutions, large domestic and international banks, family offices, retail investors and high net worth individuals, La Trobe Financial's award-winning investment management team operates the largest retail credit fund in Australia, which recently surpassed the \$10 billion AUM landmark.

The CFI.co judges report highlighted La Trobe Financial's commitment to serving the underserved, and the successful launch of its US Private Credit strategy in late 2023 to market.

Commenting on the win, La Trobe Financial's Chief Investment Officer Chris Paton stated "We are proud to be acknowledged by CFI.co for a fifth consecutive year. This ongoing endorsement reflects the history of performance we have delivered for our almost 100,000⁺ investors, having impeccably delivered on our investment objective of providing low volatility income at all points across the economic and market cycle.

We remain as committed as ever to our investment fundamentals which we have been refining since 1952, and strive, above all things, to be good stewards of our investors' capital. We remain as thoughtful as ever in the way that we deploy investor capital, and remain committed to providing the highest standard of credit and investment disciplines across the business."

This latest award follows La Trobe Financial's 12 Month Term Account - one of the highest rated and most awarded strategies in its asset class[†] - being named Australia's "Best Credit Fund – Mortgages", by *Money* magazine for the 15th consecutive year.

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

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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 c. A\$19 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 investors – including some of the world's largest financial institutions – and 3,200 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 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

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, or ask for a copy by calling us on 1800 818 818.

[^] 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.

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