

La Trobe Financial judged Australia's Best, 14 years in a row

Tuesday, 6 December 2022 – La Trobe Financial's 12 Month Term Account has been judged Australia's "Best Credit Fund – Mortgages", for the 14th consecutive time in *Money* magazine's prestigious 2023 'Best of the Best Awards.'

Money magazine's Best of the Best awards are Australia's best regarded consumer finance awards. Winners are selected by a panel of expert, independent judges following a thorough assessment of the best offerings in each sector.

Chief Investment Officer Chris Paton accepted the award on behalf of La Trobe Financial, commenting: "We're honoured that our 12 Month Term Account has been recognised as Australia's Best Credit Fund – Mortgages for the 14th consecutive year. To receive this accolade and continue to be recognised as Australia's best is a testament to our impeccable track record of delivering low-volatility, consistent monthly returns for each of our investors in our portfolio accounts.

"We have long spoken about the importance of diversification and it is through sound investment strategies, deliberately conservative settings within our portfolios and an incredible team that we have been able to help insulate and protect our investors during these times of market volatility and stress."

In the managed funds category, *Money* are aware that investors are looking for a balance of strong investment returns, investment risk management and capital protection. This multi-phase process required judges to identify factors including the variability in performance month to month, how performance compared with the market and peers, and which funds achieved the highest returns per unit of risk. This review was done over the short, medium and long term to June 30, 2022.

In announcing La Trobe Financial's landmark achievement, *Money* reported that: "Investors in La Trobe Financial's credit fund have benefited from the group's consistent returns and its 30 years of operation since 1989. The fund has pulled \$8.5 billion in assets from more than 82,000 investors around the country and overseas.

A study of the fund's 12 Month Term Account in the past two decades shows it did what it said on the tin, faring better than cash and fixed interest, but no more than equities."

La Trobe Financial's Chief Executive Officer, Chris Andrews, commented "This win – our fourteenth in a row – is just as pleasing as was our first back in 2009. The La Trobe Financial team is as committed and determined as ever to put our investors at the heart of everything that we do. That's been our way since 1952 and this latest award is a reminder that our disciplines continue to perform for investors."

About La Trobe Financial

Established in 1952 and with \$15.5 billion of assets under management, La Trobe Financial is one of Australia's oldest credit asset managers, specialising in credit investment solutions and real estate finance. La Trobe Financial has been a proven and trusted investment partner for institutional investors for seven decades, operating Australia's largest retail Credit Fund with over \$8.5 billion in assets under management and 82,000 retail investors. La Trobe Financial has 6,000 distribution points across its two divisional arms – wealth products are distributed through 2,500 advice practices; and real estate credit finance is distributed through 4,800 brokers. La Trobe Financial employs over 470 staff over 4 offices.

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.

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 the Target Market Determinations on our website or ask for a copy by calling us on 13 80 10.

Past Performance is not a reliable indicator of future performance.

To view our Awards please visit the Awards and Ratings page on our website.

© 2022 La Trobe Financial Services Pty Limited. All rights reserved. No portion of this may be reproduced, copied, or in any way reused without written permission from La Trobe Financial.

Media enquires:

Chris Paton, Chief Investment Officer +61 421 046 942