MEDIA RELEASE

For immediate release

La Trobe Financial reaches $25 billion after decades of careful growth

MELBOURNE, 29 July 2026 – La Trobe Financial has reached $25 billion in assets under management, marking an important point in a journey spanning more than seven decades and many different market conditions.

The Australian alternative asset manager now manages capital on behalf of over 130,000^ individual and institutional investors, supported by over 5,000 financial advisers.

La Trobe Financial Chief Executive Officer Chris Andrews said the milestone reflected the trust investors had placed in the manager over time.

"Reaching $25 billion is a significant achievement, but we are most proud of the way we arrived here. We have grown patiently, remained focused on careful stewardship and stayed accountable to the people whose capital we manage," Mr Andrews said.

"Every dollar belongs to a person, family or organisation with plans for the future. Caring for that capital is a privilege and a responsibility we never take for granted."

Scale serving investors

La Trobe Financial invests across thousands of individual assets, including loans supporting Australian homes, businesses and communities.

Mr Andrews said greater scale expanded the range of opportunities available to investors and strengthened the business's capacity to invest in people, technology and service.

"Scale gives us broader reach and deeper capability. It also allows us to diversify across more assets and continue building the systems and expertise needed to support investors."

"Our standards remain the gatekeeper for growth. We will deploy capital when suitable opportunities are available and when each investment offers the appropriate structure, security and margin of safety."

Positioned for the next generation of investors

Looking ahead, La Trobe Financial will continue to grow carefully while maintaining its long-term focus on investor outcomes.

"The next chapter will be guided by the same principles that brought us here: disciplined investment decisions, prudent liquidity settings, clear communication and attentive service," Mr Andrews added.

"This milestone belongs to everyone who has shared the journey with us. We thank our investors, advisers, borrowers, brokers and employees for the trust they have placed in La Trobe Financial and the contribution they have made."

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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 over A$25 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 130,000 retail investors^ and 100 institutional investors, including some of the world's largest financial institutions, supported by 5,000 financial advisers. La Trobe Financial's retail asset management business is spearheaded by the c.$14bn La Trobe Australian Credit Fund, the largest retail credit fund across Australia. Its flagship 12 Month Investment Account has been recognised as "Best Credit Fund – Mortgages" for 17 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

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