

MEDIA RELEASE

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La Trobe Financial Named Best Investment Management Team Australia 2026 — Seven Years Running

For La Trobe Financial investors, consistency and capital preservation remain paramount and that focus has once again been independently recognised.

La Trobe Financial has been named Best Investment Management Team Australia 2026 by Capital Finance International (CFI.co), marking the seventh consecutive year the firm has received this award. The recognition underscores La Trobe Financial's disciplined approach to credit investing, its commitment to capital preservation, and its ability to deliver dependable outcomes through varying market conditions.

The award follows a strong 2025 financial year in which La Trobe Financial delivered approximately \$800 million in investor returns, while maintaining uninterrupted liquidity and a conservative risk profile, key priorities for income-focused investors.

With more than \$22 billion in assets under management, including over \$14 billion in the La Trobe Australian Credit Fund, La Trobe Financial continues to provide investors with scale, resilience and confidence. Today, the firm supports almost 130,000 investors[^], working alongside almost 5,000 financial advisers nationwide.

CFI.co's Judging Panel highlighted La Trobe Financial's long-standing conservative approach to portfolio construction, particularly within the 12 Month Term Account, which is supported by a diversified portfolio of 12,457 individual loan assets and an average loan-to-value ratio of 66%, a clear demonstration of the firm's clear focus on protecting investor capital.

The judges also recognised La Trobe Financial's ongoing expansion of investor opportunities, including the launch of the La Trobe US Private Credit Fund (Retail Class), giving Australian investors access to diversified, low-volatility US private credit income, and the successful ASX listing of the La Trobe Private Credit Fund (ASX: LF1) following an oversubscribed \$300 million IPO.

According to CFI.co, these achievements reflect La Trobe Financial's *"long-standing commitment to careful portfolio construction, rigorous monitoring of market conditions, and performance designed to endure across economic cycles."*

Chris Paton, Chief Investment Officer at La Trobe Financial, said the award reinforces the firm's responsibility to investors.

"Being recognised for the seventh year in a row reflects the consistency of our investment process and the depth of experience across our team. Our focus remains firmly on protecting investor capital, maintaining liquidity and delivering reliable income outcomes across the market and economic cycle."

The CFI.co Best Investment Management Team Award is independently judged and recognises excellence in governance, risk management, performance consistency and investor outcomes.

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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\$22 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 investors[^] – including some of the world's largest financial institutions – and 4,700 supporting 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 Term 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

Disclaimer

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.

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Past performance is not a reliable indicator of future performance.

[^]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.

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