

MEDIA RELEASE

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La Trobe Financial: 16 Years as Australia's Best Private Credit Fund - Mortgages

La Trobe Financial, Australia's premier alternative asset manager is proud to announce the continued success of its flagship 12 Month Term Account after it was once again awarded *Money* magazines Best Private Credit Fund – Mortgages in the publications annual Best of the Best consumer awards.

Chief Investment Officer of La Trobe Financial, Mr Chris Paton, expressed his pride in the 12 Month Term Account's long-term success stating, *"We are delighted that we continue to be recognised year in, year out as Australia's Best Private Credit - Mortgages. This is the sixteenth consecutive year that we have accepted this award and we could not be prouder of our unrivalled success."*

We are honoured that over 100,000 investors have chosen La Trobe Financial to protect their wealth. Our commitment to delivering low volatility income and preserving capital remains unwavering.

The teams' dedication to providing a secure investment option has made us a trusted partner for investors seeking stability and consistent returns. With the 12 Month Term Account, investors can have peace of mind knowing that their wealth is protected and their financial goals are within reach".

La Trobe Financial's 12 Month Term Account has a proven track record of safeguarding investor capital. Not a single cent of capital has been lost in its two-decade existence. This remarkable achievement speaks volumes about the trust and confidence that investors place in La Trobe Financial.

One of the key features of the 12 Month Term Account is its competitive variable interest rate, which enables investors to earn monthly income. This income stream is designed to be predictable throughout all economic cycles.

By offering a time-tested investment solution, La Trobe Financial ensures that investors can rely on consistent returns while minimising the impact of market fluctuations.

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 35 years of operation. The Credit Fund has \$12 billion in assets from more than 100,000 investors* around the country and overseas.

Michelle Baltazar, editor-in-chief at *Money* magazine stated, *"Congratulations to La Trobe Financial on a record breaking 16-year winning streak. Their long-term commitment to delivering consistent returns while maintaining a stellar risk profile in this award category is highly commendable. Through economic ebbs and flows, La Trobe Financial has exemplified excellence, making this award well-deserved and truly earned"*.

Baltazar said that in the managed funds category, La Trobe Financial has delivered a low-volatility income that help many investors reach their financial goals, from saving up for a home deposit to generating a reliable income for retirement. *Money* considered a variety of factors to determine the winner of this award, 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 30 June 2024.

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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\$20 billion assets under management.

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* – including some of the world's largest financial institutions – and over 4,000 supporting financial advisers.

La Trobe Financial's retail asset management business is spearheaded by the \$12 billion La Trobe Australian Credit Fund, the largest retail credit fund across Australia. Its flagship 12 Month Term Account has been recognised as "Best Private Credit - Mortgages" for 16 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 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 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 (**PDS**) when deciding whether to invest or to continue to invest in the fund. The PDS and Target Market Determination is available on our website.

* 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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Past performance is not a reliable indicator of future performance.

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