

## **La Trobe Financial welcomes OMERS as a new institutional shareholder**

Investment by leading Canadian pension fund reflects the strength of La Trobe Financial's platform, performance and long-term growth prospects

**MELBOURNE, 27 October 2026** – La Trobe Financial today announced that OMERS, one of Canada's largest defined benefit pension plans, has agreed to acquire an indirect minority interest in the business from Brookfield.

Following completion of the transaction, Brookfield will remain La Trobe Financial's majority shareholder, OMERS will join Brookfield and Aight as institutional investors supporting La Trobe Financial's continued growth.

This investment represents another significant endorsement of La Trobe Financial's business model, market position and long-term strategy. It follows Aight's minority investment earlier this year and comes during a period of record growth.

### **Key points**

- OMERS, a Canadian pension plan with C\$151.5 billion in net assets, will acquire an indirect minority interest in La Trobe Financial from Brookfield.
- Brookfield remains majority shareholder. OMERS joins Brookfield and Aight as institutional shareholders.
- There is no change to La Trobe Financial's management team, strategy, investment philosophy or the way investor funds are managed.

### **Chris Andrews, Chief Executive Officer of La Trobe Financial, said:**

"OMERS' investment is a strong vote of confidence in La Trobe Financial, our people and the platform we have built over more than seven decades.

"We are pleased to welcome another highly regarded, long-term institutional investor to our shareholder base. OMERS shares our conviction in the growing opportunity to provide high-quality investment offerings to Australian investors, and its investment provides further support for the continued execution of our strategy.

"Brookfield remains our majority shareholder and an important strategic partner. Its support, operating expertise and global perspective have contributed to the continued development of our business since its investment in 2022.

"Together with Brookfield, Aight and now OMERS, we have an exceptional group of institutional shareholders aligned behind La Trobe Financial's next phase of growth. Our focus remains unchanged: delivering strong outcomes for our investors and

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borrowers, maintaining disciplined capital management and continuing to invest in our people, products and capabilities.”

Since Brookfield's acquisition in 2022, La Trobe Financial has delivered strong growth, with assets under management reaching A\$27 billion, up from A\$22 billion at the end of 2025. Drawing on Brookfield's operating expertise, La Trobe Financial has expanded its product offering including the launch of a US private credit product and a listed investment trust on the Australian Securities Exchange.

The business has also invested significantly in its systems to deepen investor engagement, enhance client service and improve operating efficiencies. This transaction follows the completion of a minority stake investment in La Trobe Financial by Asia-focused private equity investment manager Axight earlier this year.

The transaction is subject to customary regulatory approvals and is expected to close by January 2027.

## **ENDS**

### **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 A\$27 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 5,000 supporting financial advisers. La Trobe Financial’s retail asset management business is spearheaded by the c.\$15bn 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](http://www.latrobefinancial.com.au)

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