

La Trobe Financial secures *Money* 2021 Best Credit Fund – Mortgages for the 12th year in a row

Friday, 4 December 2020 – La Trobe Financial, a Blackstone Portfolio Company, announced today that it has been judged **Australia's Best Credit Fund - Mortgages** in *Money* magazine's prestigious 2021 Best of the Best Awards. This award marks it a straight dozen for La Trobe Financial's flagship investment account - the 12 Month Term Account (**Credit Fund**), a record unmatched in the market.

The annual Best of the Best awards identify Australia's best (and best value) managed funds, superannuation funds, exchange traded products, banking products and insurers. The awards thoroughly assess hundreds of product providers and thousands of products, choices and options. In the managed fund section *Money* understands that investors are looking for a balance of return, risk management and capital protection. The judges compare fund volatility against peers and short, medium and long-term performance. *Money* reported that the Credit Fund "had well and truly stood the test of time and for 12 years the Credit Fund had won its category in *Money's* Best of the Best awards."

La Trobe Financial's Chief Investment Officer Chris Andrews was delighted to receive the news, "to receive this accolade and continue to be recognised as Australia's very best is a testament to our sound investment processes and the incredible team we have here. It's particularly rewarding this year considering the once in a lifetime pandemic that has affected all global markets."

La Trobe Financial's strong performance in times of volatility for nearly 70 years has been proven and the Credit Fund holds the highest ratings of any fund in the sector. La Trobe Financial's industrial strength credit assessment process, highly conservative LVR maxima and careful portfolio construction disciplines are hallmarks of the investment programme. Together with an innovative co-investment model, this rigour delivers market-leading diversification and buffers portfolios against times of market stress. In the 2020 financial year, La Trobe Financial returned an extraordinary \$211.2 million in interest payments to investors.

La Trobe Financial's President and Chief Executive Officer Greg O'Neill OAM added "meeting consumer investor needs is of paramount importance to us. So many of the investors in the Credit Fund are typical Australian mum and dad investors and this accolade attests to our consistent returns through responsible and ethical lending practices."

The award comes hot off the heels of another honour, the 2021 Best Investment Management Team - Australia, recently awarded by Capital Finance International magazine.

The Credit Fund has also been rated 'recommended' by Lonsec and Zenith. It is also highly rated by SQM Research with a 4.25 star suggesting "that it outperforms its peers and benchmark most of the time and that management is of a high calibre".

About La Trobe Financial

Established in 1952 and with \$12 billion of assets under management, La Trobe Financial is one of Australia's leading diversified wealth managers, specialising in funding and investment solutions. La Trobe Financial has been a proven and trusted investment partner for institutional and retail investors, operating Australia's largest retail Credit Fund with \$5 billion in assets under management and 53,000 retail investors. It is 80% owned by Blackstone, one of the world's leading investment firms with more than US\$564 billion of assets under management worldwide, and 20% owned by management.

La Trobe Financial is regulated by the Australian Securities & Investments Commission (ASIC) and holds the requisite regulatory licences to manage the La Trobe Australian Credit Fund - La Trobe Financial Asset Management Limited ACN 007 332 363 AFSL 222213.

For further details please visit our website www.latrobefinancial.com.

Media enquires:

Chris Andrews, Senior Vice President, Chief Investment Officer +61 410 220 183