

La Trobe Financial's Flagship Investment Account Rated 'Recommended' by Leading Ratings Agency

12 June 2020 – La Trobe Financial today announced that leading independent fund ratings agency, Zenith Investment Partners (Zenith), has released its annual rating of La Trobe Financial's flagship 12 Month Term Account as 'Recommended'.

In assigning ratings, Zenith deploys a rigorous methodology, taking into account a number of key operational and risk return factors, including management, corporate governance, process, fees and returns.

In this current period of unprecedented economic volatility, Zenith highlighted a number of key strengths:

- *"La Trobe Financial has established a sound track record in this sector, which Zenith believes is the result of its deep lending experience over 68 years."*
- *"In Zenith's opinion, the credit approval process is robust and consistent with industry best practice. Furthermore, when considered in the context of low-doc lending, Zenith believes La Trobe Financial's approval process is positioned to provide stronger levels of risk mitigation relative to peers."*
- *"The 12 Month Term Account represents a differentiated offering relative to traditional fixed income strategies, and an attractive entry point for those seeking to gain exposure to prime and near-prime mortgages."*

Chris Andrews, La Trobe Financial's Chief Investment Officer, commented, "We welcome the research team's results and findings. Zenith has been a mainstay of property and funds management assessment for many years, and has an outstanding reputation for accuracy and reliability."

"We are pleased with their recognition and remain resolutely committed to the highest standards of credit and investment discipline on both our institutional investment mandates covering \$6.2 billion, and our \$5 billion retail Credit Fund."

"It is these high standards that our 45,000 clients and their financial advisers demand of us. We are particularly pleased that our 12 Month Term Account now totalling \$3.3 billion continues to attract interest from investors and advisers even during these economic times and we have developed enormous conviction in its merits over the past two decades," continued Mr Andrews.

Troy Stratton, La Trobe Financial's Deputy Chief Investment Officer added, "We are pleased to receive such a strong rating, particularly at an important time for investors with so much increased share market volatility across the global economy. Investors are becoming increasingly focused on generating better risk-adjusted returns and diversifying their portfolios."

To view the full Ratings report, [click here](#).

Today's rating announcement follows La Trobe Financial's recent acknowledgement by the London based International Finance Magazine as the 'Best Investment Company in Australia'. This is the seventh time La Trobe Financial has been recognised for this Award, an outstanding achievement in today's volatile and complex environment.

About La Trobe Financial

With A\$11 billion of assets under management, La Trobe Financial is one of Australia's leading diversified wealth managers, specialising in funding and investment solutions. Since 1952, 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 45,000 retail investors. It is 80% owned by Blackstone, the world's largest alternative asset manager, with over US\$538 billion of assets under management worldwide.

La Trobe Financial is regulated by the Australian Securities & Investments Commission (**ASIC**) and holds the requisite regulatory AFSL and ACL licences to operate and place RMBS issuances. For further details please visit our website www.latrobefinancial.com.

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