



La Trobe Financial's Pooled Mortgages Option ("the Fund") has been judged the **Best Mortgage Fund in Australia** by the personal finance journal *Money* magazine.

As quoted by Pam Walkley, Chief Editor of *Money* magazine "No other managed Fund has ever achieved such triumph seven years in row."

The objective of the Fund has long been to provide investors with a choice of capital-stable, reliable income generating investment options. The Fund's continued performance in times of low interest rates continues to attract attention across the market.

## BEST MORTGAGE FUND



**GOLD WINNER LA TROBE**

Strong focus on first-class assets and investors' interests pays off

FUND	APIR	START DATE	RETURNS (%PA)			ENTRY FEE	MER/ICR (%PA)	MIN INV'T
			1 YEAR	3 YEAR	INCEPT			
<b>1 La Trobe Aust Mortg, Pooled Opt</b>	LTC0002AU	1-Oct-02	5.79%	6.29%	7.29%	none	1.50%	\$1000

Source: Morningstar

The funds were selected from those highest rated by research houses SQM Research, Zenith Investment Partners and Lonsec. Each fund had to be open to new investment with a minimum initial investment of \$25,000 or less. Funds were ranked by the total points awarded for their rating by each research house. Performance data as at September 30, 2015.

For seven years straight, **La Trobe's Pooled Mortgage Fund** has won this award. Again, it's the only mortgage fund deemed worthy of an award by our three judges, Lonsec, Zenith and SQM Research.

The fund was awarded a 4.25-star rating this year by

SQM Research, up from its previous four stars, "reflecting our continued faith in the fund's skilled and experienced investment team," says SQM managing director Louis Christopher.

It has beaten its benchmark and peer group over the current

year and since inception, he says. "The La Trobe Financial multi-award winning fund has achieved another exceptional year of growth and is Australia's largest retail credit fund with more than \$1 billion in investments serving 10,500 investors," says Chris Andrews, vice-president and

CIO of La Trobe. "Our focus on investment-grade credit assets is producing a well-diversified portfolio of first-class assets for investors. Our investment and customer service philosophy is to focus on investors' interests first and we will continue to stick to this successful path."

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