

## MEDIA RELEASE

14/2/2025

### La Trobe Financial Retains 'Superior' Operational Capability Assessment

La Trobe Financial, Australia's premier alternative asset manager, is proud to announce that Foresight Analytics has reaffirmed La Trobe Financial Asset Management Limited (LFAM), the Responsible Entity for the La Trobe Australian Credit Fund, with a prestigious "Superior" rating. This rating, represents the highest available on Foresight Analytics' Operational Due Diligence (ODD) scale, and recognises the group's exceptional ability to perform its operational role.

The Foresight Analytics Operational Capability Assessment (OCA) report highlights LFAM's significant growth, driven by the operational and financial support of La Trobe Financial Group and Brookfield Asset Management. The company currently manages \$12.5 billion in private credit, contributing to the Group's assets under management (AUM) of over \$20 billion, all while maintaining the trust of a growing base of more than 100,000 investors.

LFAM's success can be attributed to its superior governance, performance, experience and commitment to growing its management team. With very strong risk management and compliance frameworks in place, the company ensures the protection and growth of investor interests. Being among the largest originators of Australian Real Estate Private Credit assets, LFAM's disciplined process has driven resilience in performance with successful management at all points along the economic cycle.

The report highlights LFAM's strategic expansion with the introduction of the La Trobe US Private Credit Fund, acknowledging the operational complexity, currency risks, and liquidity challenges. It notes that LFAM has proactively taken measures to enhance resources and improve processes to support this growth initiative.

Chris Paton, Chief Investment Officer of La Trobe Financial, commented: *"We are pleased that Foresight Analytics has recognised our focus on operational excellence, risk management, and governance. For over 35 years, our core business has been providing Australian investors with high quality, low volatility investments to meet income and lifestyle needs, delivered in a simple, transparent, and easy to understand way. This recognition confirms our commitment to strong human resources, investor protection, and consistent financial performance."*

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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 over A\$20 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 100,000+ investors<sup>^</sup> – including some of the world's largest financial institutions – and 4,000 supporting financial advisers.

La Trobe Financial's retail asset management business is spearheaded by the c.\$12bn La Trobe Australian Credit Fund, the largest retail credit fund across Australia. Its flagship 12 Month Term Account has been recognised as "Best Credit Fund – 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](http://www.latrobefinancial.com.au)

#### Disclaimer – La Trobe Financial

La Trobe Financial is regulated by the Australian Securities & Investments Commission (ASIC) and holds the requisite regulatory AFSL and ACL to 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 No. 222213 is the responsible entity of the La Trobe Australian Credit Fund ARSN 088 178 321 and the La Trobe US Private Credit Fund ARSN 677 174 382. It is important that you consider the relevant Product Disclosure Statement (**PDS**) before deciding whether to invest or continue to invest in the fund. The PDSs and Target Market Determinations are available on our website.

Past performance is not a reliable indicator of future performance.

La Trobe Financial Services Pty Limited ACN 006 479 527 Australian Credit Licence 392385.

\*To view our Awards and Ratings please visit the Awards and Ratings page on our [website](#).

<sup>^</sup> 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 trusts or SMSFs.

Any financial product advice is general only and has been prepared without considering your objectives, financial situation or needs. You should, before investing or continuing to invest in the La Trobe Australian Credit Fund & La Trobe US Private Credit Fund, consider the appropriateness of the advice having regard to your objectives, financial situation or needs and obtain and consider the relevant Product Disclosure Statement for the fund.