

MEDIA RELEASE

29/1/2025

La Trobe Financial named Australia's Best Investment Management Team for sixth year in a row

For a landmark sixth consecutive year, the investment team at La Trobe Financial has been awarded 'Best Investment Management Team - Australia' by Capital Finance International (CFI.co).

Managing over \$20 billion in assets on behalf of major institutions, domestic and international banks, family offices, retail investors, and high-net-worth individuals, La Trobe Financial continues to set the standard in alternative asset management. With its flagship La Trobe Australian Credit Fund recently surpassing \$12 billion in assets under management (AUM), the company operates the largest retail credit fund in the country.

The CFI.co judges commended La Trobe Financial for its commitment to delivering superior results and innovative retirement-focused solutions. They highlighted the launch of the US Private Credit Fund as part of the firm's Global Asset Management strategy, offering investors premium global investment opportunities.

La Trobe Financial's extensive investor education initiatives, regular newsletters, and transparent communications were also praised for fostering trust and engagement. Roadshows and direct interactions with families and retirees demonstrate the company's inclusive and grounded approach. The firm's strategic partnership with Morgan Stanley further enhances its highly disciplined capabilities and cements its position as a leader in the competitive investment landscape.

Chris Paton, Chief Investment Officer of La Trobe Financial, said "This ongoing endorsement by CFI reflects the history of performance we have delivered to our 100,000⁺ investors. We remain as committed as ever to our investment fundamentals, which we have been refining since 1952, and strive, above all, to be good stewards of our investors' capital. Our disciplined approach ensures we deploy investor funds thoughtfully and maintain the highest standards of credit and investment disciplines."

This recognition follows La Trobe Financial's flagship 12 Month Term Account being named "Best Credit Fund – Mortgages" by *Money* magazine for an unprecedented 16th consecutive year*, solidifying its position as a trusted and proven investment partner.

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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[^] – 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

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](#).

[^] 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.