

Australian Unity Wealth Ratings

As at May 2026

The following funds have been assigned ratings that reflect the level of conviction each investment research company has in the fund's ability to generate risk-adjusted returns consistent with its stated objectives. To request a copy of a ratings report, please contact us: AUIPlatforms@australianunity.com.au



Australian shares

Platypus Australian Equities Fund – Wholesale Units

- Lonsec – Recommended
- Zenith – Recommended



Investment Bonds

Lifeplan Investment Bond

- Lonsec – Recommended

Lifeplan Education Bond

- Lonsec – Recommended

10Invest

- Lonsec – Recommended

FuneralPlan Bond

- Lonsec – Approved



Property Funds

Select Income Fund

- SQM Research – 4.25 Stars – Superior

Specialist Disability Accommodation Fund

- Lonsec – Recommended



Healthcare Funds

Australian Unity Healthcare Property Trust – Wholesale Units

- Lonsec – Recommended
- Zenith – Recommended
- SQM – 4.5 Stars - Highest Investment Grade

Australian Unity Healthcare Property Trust – Class A

- Lonsec – Recommended
- SQM – 4.5 Stars – Highest Investment Grade



Important information

Ratings are only one factor to be considered when deciding whether to invest in a financial product.

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The reports that included the ratings were published by Lonsec Research Pty Ltd ABN 11 151 658 561 AFSL 421 445 (Lonsec) for the Australian Unity Specialist Disability Accommodation Fund and Australian Unity Healthcare Property Trust -Wholesale Units on 04 May 2026, the 10Invest, Lifeplan Education Bonds, Lifeplan Funeral Bond, and Lifeplan Investment Bond on 28 April 2026, and for the Platypus Australian Equities Fund –Wholesale units on 8 October 2025. Lonsec receives a fee from fund managers for the preparation of reports. The report / rating is general advice only. An investor should be aware that: a) the advice has been prepared without taking into account an investor's objectives, financial situation or needs; b) an investor should consider the appropriateness of the advice having regard to their own objectives, financial situation or needs before acting on the advice; and c) an investor should obtain a PDS relating to the product, consider the PDS and seek independent financial advice before making any decision about whether to acquire the product. The rating is not a recommendation to purchase, sell or hold any product. Past performance is not a reliable indicator of future performance. Ratings are prepared based on information available at the time of preparation and may be subject to change by Lonsec without notice. Visit lonsec.com.au for important documents (FSG, Conflicts Statement). © 2026 Lonsec. All rights reserved.

The rating contained in this document is issued by SQM Research Pty Ltd ABN 93 122 592 036 AFSL 421913 (assigned to Select Income Fund –10 February 2026/ assigned to Healthcare Property Trust Wholesale and Class A Units –13 March 2026). SQM Research is an investment research firm that undertakes research on investment products exclusively for its wholesale clients, utilising a proprietary review and star rating system. The SQM Research star rating system is of a general nature and does not take into account the particular circumstances or needs of any specific person. The rating may be subject to change at any time. Only licensed financial advisers may use the SQM Research star rating system in determining whether an investment is appropriate to a person's particular circumstances or needs. You should read the product disclosure statement and consult a licensed financial adviser before making an investment decision in relation to this investment product. SQM Research receives a fee from the Fund Manager for the research and rating of the managed investment scheme.

Get in touch

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