

# Australian Unity Wealth Ratings

As at 19 February 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](mailto:AUIPlatforms@australianunity.com.au)



## Australian shares

### Platypus Australian Equities Fund – Wholesale Units

- Lonsec - Recommended
- Zenith – Recommended



## Investment Bonds

### Lifeplan Investment Bond

- Lonsec - Highly Recommended

### 10Invest

- Lonsec - Recommended

### Lifeplan Education Bond

- Lonsec - Investment Grade

### 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 - Highly Recommended
- Zenith - Recommended

### Australian Unity Healthcare Property Trust – Class A

- Zenith - Recommended



## Important information

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

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The Lonsec Rating published on 22 August 2025 for the Australian Unity Specialist Disability Accommodation Fund, 9 May 2025 for Australian Unity Healthcare Property Trust - Wholesale Units, 4 April 2025 for 10Invest, 4 April 2025 for the Lifeplan Education Bonds, 4 April 2025 for the Lifeplan Funeral Bond, 4 April 2025 for the Lifeplan Investment Bond are issued by Lonsec Research Pty Ltd ABN 11 151 658 561 AFSL 421 445 (Lonsec Research). Ratings are general advice only and have been prepared without taking account of investors' objectives, financial situation or needs. Consider your personal circumstances, read the product disclosure statement and seek independent financial advice before investing. The ratings are not a recommendation to purchase, sell or hold any product. Past performance information is not indicative of future performance. Ratings are subject to change without notice and Lonsec Research assumes no obligation to update. Lonsec Research uses objective criteria and receives a fee from the Fund Manager. Visit [lonsec.com.au](http://lonsec.com.au) for ratings information and to access the full report. © 2025 Lonsec. All rights reserved.

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## Get in touch

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