

PRESS RELEASE

Sydney, 28 May 2021 – Foresight Analytics rates three Coolabah Capital Investment Funds

Foresight Analytics has completed a ratings assessment of [Coolabah Capital Investments \(Retail\) Pty Limited](#)'s three funds; the [Smarter Money Higher Income Fund](#), the [Smarter Money Fund](#), and the [Smarter Money Long Short Credit Fund](#) (the Funds). All three Funds have been assigned SUPERIOR rating. This is the highest rating grade that can be achieved under [Foresight Analytics' 5-point Investment Ratings Scale](#).

The Smarter Money Higher Income Fund and the Smarter Money Fund have been assigned a 'SUPERIOR' investment rating and a Foresight Complexity Indicator 'RELATIVELY SIMPLE', which reflects the view that the Funds are considered relatively simple financial products, and that the investment manager will seek to outperform their chosen mainstream market sector.

The Smarter Money Long Short Credit Fund has been upgraded to a 'SUPERIOR' investment rating. This fund was assigned a 'VERY STRONG' rating in 2020. A Foresight Complexity Indicator of 'MORE COMPLEX' has also been assigned, designating the Fund as a more complex financial product. This indicates that the Fund generates returns through a variety of non-standard investment strategies; these strategies may include the use of leverage, the ability to go long and short, investment in sub-investment grade securities, and the use of over-the-counter credit derivatives.

SUPERIOR ratings are the highest on the investment rating scale used by Foresight Analytics. These ratings denote a very high level of confidence that the Fund can deliver a risk-adjusted return in line with the Fund's investment objective.

All three of the Funds are managed by Coolabah Capital Investments (Retail) Pty Limited (CCIR) – previously known as Smarter Money Investments Pty Ltd. CCIR are a fixed-interest specialty manager with offices in Melbourne, Sydney, and London.

Foresight Analytics' analyst, [Maggie Callinan](#), says "the ratings assigned to these Funds reflects Foresight Analytics' confidence in CCIR's investment strategy and management skill". She added, "CCIR's nimble strategy, as well as the quality and liquidity of their portfolio has allowed the investment team to perform well since inception and throughout the COVID period".

The research report is available via "[Foresight Adviser Knowledge Centre](#)".

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About Foresight Analytics

Foresight Analytics, an independent Sydney based firm, provides investment diligence, data analytics, and advisory solutions to leading investment management companies, superannuation funds and wealth groups across the Asia Pacific. Foresight's innovative, evidence-based approach blends both human and forensic insights to illuminate investment decisions of its clients.

Foresight's fiduciary solutions include Diligence Services (Investment Diligence, Ops Diligence, ESG Diligence & Risk Diligence), Data Analytics and Asset Consulting. Foresight's fund strategy solutions include Data Analytics for asset managers, Fund Strategy Benchmarking and Strategic Capability Assessments.

Foresight Analytics was founded in 2015 by Jay Kumar, a former executive of Morningstar, Optimix Investment Management, ANZ Wealth & Private Bank and the Reserve Bank of Fiji.

For more information, please visit our website on www.foresight-analytics.com and social media platforms via [Facebook](#), [LinkedIn](#), or [Twitter](#).