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New Benchmark: IAM Clients Now Hold Over \$500 Million in Syndicated Loans

IAM clients now collectively hold more than \$500 million in bank syndicated loans, signalling growing demand for transparent, high-yield investments as traditional products like bank hybrids become less accessible.

Bridging Institutional and Private Capital

Historically, access to the corporate syndicated loan market has been reserved for large institutions. At IAM, we stand out as the only financial services firm offering direct ownership of bank syndicated term loans to wholesale and high net worth investors. This innovation bridges the gap between institutional and private capital, unlocking institutional-grade opportunities for a broader range of investors and further cementing our leadership in the Australian fixed income market.

Why Syndicated Term Loans?

Syndicated term loans represent the most attractive risk-reward in the fixed income space, typically yielding 7-10 per cent with the added rigour of multi-bank due diligence. They are especially appealing to high net worth and wholesale investors who value control, direct exposure, and robust risk management. By trading some liquidity for higher returns, investors can diversify their portfolios without taking on the risks often associated with other assets such as property construction or agricultural investments, while still benefiting from the security of established corporate cash flows and assets. As regulation changes and the market continues to shift, syndicated term loans are poised to play an even larger role in diversified portfolios. However, understanding the nuances - such as liquidity, due diligence, and the nature of underlying assets - is critical.

Future Loan Investment Opportunities

To learn more about current syndicated loan opportunities or to register your interest in future deals, contact one of our IAM Relationship Managers.

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