

For Immediate Release

## **BROOKFIELD OAKTREE WEALTH SOLUTIONS EXPANDS UCI PART II PLATFORM, LAUNCHES PRIVATE CREDIT STRATEGY FOR WEALTH INVESTORS**

**NEW YORK – Jan. 22, 2025** – [Brookfield Oaktree Wealth Solutions](#), a leading provider of alternative investments to financial advisors and their clients globally, today announced the addition of the Oaktree Strategic Credit Fund to its UCI Part II (SICAV) platform for private wealth investors in Europe, Asia, and Latin America. The Luxembourg-based, regulated fund framework provides individual investors greater access to the alternative investment strategies from Brookfield and Oaktree. This marks the second evergreen fund available to individual investors across the regions, following the launch of [Brookfield's Infrastructure Income strategy](#) in April 2024.

Managed by Oaktree, a leading global alternative investment manager, the Oaktree Strategic Credit Fund (SICAV) utilizes an all-weather approach, offering wealth investors access to a diversified portfolio of income-generating global private credit investments. The strategy leverages Oaktree's extensive credit expertise developed over three decades and through multiple market cycles. Distributed by Brookfield Oaktree Wealth Solutions, this marks the first Oaktree open-ended private credit strategy made available to individual investors in EMEA.

John Sweeney, CEO of Brookfield Oaktree Wealth Solutions, said, "We are committed to bringing the best of both Brookfield and Oaktree's alternative solutions to wealth investors across the globe. The launch of additional strategies in our UCI Part II platform further signifies this commitment and we look forward to finding innovative ways to bring the two firms' institutional capabilities and track records to the wealth channel."

Tara Newbery, Brookfield Oaktree Wealth Solutions Managing Director and Head of Legal EMEA and APAC, added, "We are delighted to expand our semi-liquid offering to include Oaktree's Strategic Credit strategy. Our Luxembourg UCI Part II umbrella fund has been structured to offer our distribution partners multiple strategies through one operational onboarding process, allowing for swift onboarding of new strategies as they are added to the platform."

Brookfield Oaktree Wealth Solutions was launched in April 2021 with the goal of expanding alternative investments to financial advisors and their clients, globally. The provider now offers a variety of liquid, semi-liquid, and private strategies across real estate, infrastructure, credit, and private equity, with 150 employees across 10 countries, including our recently opened office in Zurich. Managing over \$1 trillion in assets, Brookfield and Oaktree together comprise one of the largest alternative asset managers in the world.

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### **About Brookfield Asset Management**

Brookfield Asset Management Ltd. (NYSE: BAM, TSX: BAM) is a leading global alternative asset manager with over \$1 trillion of assets under management across renewable power and transition, infrastructure, private equity, real estate, and credit. We invest client capital for the long-term with a focus on real assets and essential service businesses that form the backbone of the global economy. We offer a range of alternative investment products to investors around the world — including public and private pension plans, endowments and foundations, sovereign wealth funds, financial institutions, insurance companies and private wealth investors. We draw on Brookfield's heritage as an owner and operator to invest for value and generate strong returns for our clients, across economic cycles. For more information, please visit our website at [www.bam.brookfield.com](http://www.bam.brookfield.com).

### **About Oaktree Capital Management**

Oaktree is a leader among global investment managers specializing in alternative investments, with \$205 billion in assets under management as of September 30, 2024. The firm emphasizes an opportunistic, value-oriented, and risk-controlled approach to investments in credit, equity, and real estate. The firm has more than 1,200 employees and offices in 23 cities worldwide. For additional information, please visit Oaktree's website at <http://www.oaktreecapital.com/>.

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### **Important Disclosures**

*Brookfield Oaktree Wealth Solutions is registered as a broker-dealer with the U.S. Securities & Exchange Commission ("SEC") and is a member of Financial Industry Regulatory Authority, Inc. ("FINRA") and the Securities Investor Protection Corporation ("SIPC").*

*Oaktree Strategic Credit Fund (SICAV) will be registered for sale in key jurisdictions across Europe and APAC.*