

FOR IMMEDIATE RELEASE

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7IM launches new low-cost multi-asset fund range

7IM has launched a new range of multi-asset funds, to provide advisers with low-cost access to deeply diversified investment solutions.

The new funds – the 7IM Pathbuilder range – will be managed by the firm’s experienced Investment Management Team and underpinned by its robust strategic asset allocation (SAA) framework.

The funds are designed to provide advisers with a passive and low-cost option to complement their existing multi-asset strategies with a deeper level of diversification, critical in the current market conditions.

Utilising 7IM’s robust risk management process and SAA, which has a 17 year track record of delivering attractive inflation adjusted returns through all market environments, the new launch will comprise of three funds – 7IM Pathbuilder 1, 2 and 3 – each with an annual management charge of 0.22%.

The funds will be immediately available on the 7IM Platform and will be made available on third party platforms soon.

Verona Kenny, Managing Director of Intermediary at 7IM said: “7IM has been a long-term believer in the utilisation of passive investments to provide simple, cost-effective and well-diversified solutions that can meet the varying needs of our clients.

“In the current environment, access to truly deeper levels of diversification has never been more important and we believe there is appetite from advisers for a low-cost range of volatility managed funds, underpinned by a proven strategic asset allocation framework and investment philosophy.”

Martyn Surguy, CIO of 7IM adds: “Traditional balanced portfolios usually aim to deliver diversification by mixing equities for growth and bonds for their defensive properties, but at 7IM we have long since believed that investors should be looking for far more than this traditional split.

“As truly multi-asset investors, our strategic asset allocation has a proven track record of controlling the downside of portfolios while delivering our clients strong returns with true diversification benefits. Something which has arguably never been more important than in the current environment.”

Past performance is not a guide to future returns, chart(s)/data for illustration purposes and are not for further distribution.

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Notes to Editors:

*figures shown are for 7IM Holdings Limited

About 7IM

It all began in 2002, with seven of us in a basement establishing 7IM because we couldn't find anywhere we wanted to invest our families' money. Our assets under management now stand at around £17bn, and we have moved from 'basement' to 'Bishopsgate' in the City of London.

We manage money aiming to meet people's medium to long-term return expectations. Fundamentally, we believe in active asset allocation in both active and passive investments (where we were one of the first to offer actively managed passive portfolios). We build global portfolios based on that allocation, and include alternative assets where appropriate to manage the risk reward trade off. Active currency management is also at the core of what we do.

7IM provides investment services to professional wealth managers, planners, advisers and private investors. These include: discretionary investment management, a range of multi-asset portfolios, an investment and open architecture trading platform and a fantastic app, 7IMagine, which brings client portfolios to life.

Multigenerational investing

We do our best to pass on economies of scale, reducing fees so more investors within a family save with us. Grandparents, through to parents and their children can invest as individuals with one charging structure – whether they live under the same roof or not.

A story of continuous innovation.

In 2013, we launched 7IMagine, an app allowing investors and advisers to keep up to date with their portfolio. The brainchild of some clients – professional 'gamers' uninspired by their paper statements – 7IMagine was enriched in February 2016, with My Future. Again using gaming technology, My Future allows advisers and investors to capture details about family or individual finances, including any number

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of streams of income, properties, other assets and expenses, to help identify how sustainable their finances are and if / when their retirement income will run out.

Our funds

- Our **AAP fund range (Asset Allocated Passive)** is populated largely with passive structures to keep costs to a minimum. Asset allocation is actively managed to help exploit opportunities and reduce risk across the spectrum: **7IM AAP Adventurous, 7IM AAP Moderately Adventurous, 7IM AAP Balanced, 7IM AAP Moderately Cautious, 7IM Cautious and 7IM AAP Income.**
- Our **Multi-Manager fund range** invests in a range of active and passive vehicles. Costs still matter, but if we think an actively managed fund can outperform a passive alternative we have the freedom to choose it. Asset allocation is actively managed. There are different funds for different profiles: **7IM Adventurous, 7IM Moderately Adventurous, 7IM Balanced and 7IM Moderately Cautious.**
- We also have a selection of funds designed to meet specific needs, such as the **7IM Personal Injury Fund**, the **7IM Real Return Fund** or the SRI focussed **7IM Sustainable Balance Fund.**

Our Model Portfolios

The 7IM Model Portfolios are a range of risk rated portfolios and are available within our discretionary investment services and standalone on the 7IM platform and other platforms. The Models use the same investment process and asset allocation as our funds.

Our range of Model Portfolios are available across the risk profiles: **7IM Adventurous Model Portfolio, 7IM Moderately Adventurous Model Portfolio, 7IM Balanced Model Portfolio, 7IM Moderately Cautious Model Portfolio, 7IM Cautious Model Portfolio and 7IM Income Model Portfolio.**

In 2019, we launched **7IM Pathway**, a diversified range of passive multi asset model portfolios underpinned by our robust Strategic Asset Allocation (SAA) process. The Pathway Model Portfolios differ from our traditional offering and are built purely using a streamlined version of 7IM's robust (SAA).

The 7IM funds and Model Portfolios are available through the 7IM Discretionary and Platform as well as on other platforms.

Important information: The information contained in this document does not constitute investment advice and if you are in any doubt about the suitability of the investment or service, you should consult a professional financial adviser. The value of investments, and the income from them, can fall as well as rise and you may not get back the full amount invested. Seven Investment Management LLP is authorised and regulated by the Financial Conduct Authority, the Jersey Financial Services Commission and the Guernsey Financial Services Commission. Member of the London Stock Exchange. Registered office: 55 Bishopsgate, London EC2N 3AS. Registered in England and Wales No. OC378740.