

# 15 years experience in responsible investing

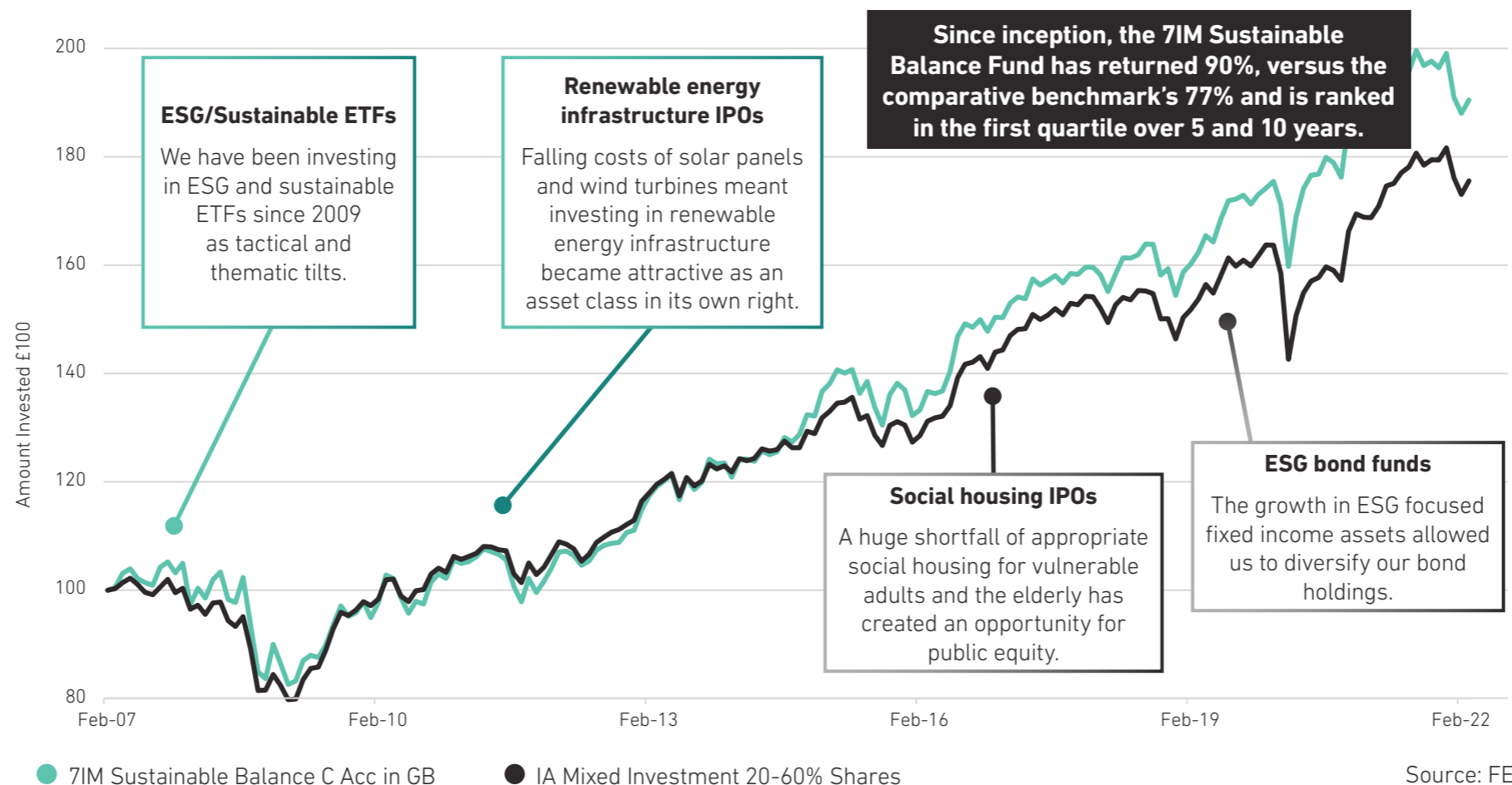


NOVEMBER 2022

**We've been successfully running the Sustainable Balance Fund since 2007, giving us an enviable track record of performance over 15 years – many funds cannot even be assessed over three.**

The chart shows you just how much experience we have in this area and some of the investments we have made along the way. We have watched the ESG space grow around us giving us deeper understanding and invaluable experience, which has fed into the fund's performance history.

**7IM Sustainable Balance Fund v Comparative Benchmark**



Recently we expanded our responsible investment range with the launch of the 7IM Responsible Choice Model Portfolios, allowing clients to access our experience and expertise in responsible investing through a range of risk-rated portfolios at the competitive price of 0.30% per annum.

**Discover more about our responsible choice range**

[Click here](#)

## Annualised performance

	3 Years	5 Years	10 Years
7IM Sustainable Balance C Acc in GB	5.5%	4.3%	5.9%
IA Mixed Investment 20-60% Shares	4.5%	3.5%	4.9%
Quartile	2	1	1

## Discrete performance

	Q1 2021 – Q1 2022	Q1 2020 – Q1 2021	Q1 2019 – Q1 2020	Q1 2018 – Q1 2019	Q1 2017 – Q1 2018	Fund Inception
7IM Sustainable Balanced C Acc in GB	1%	18.1%	-1.6%	4.6%	0.6%	89.7%
IA Mixed Investment 20-60% Shares	2.7%	19.8%	-7.2%	2.9%	0.8%	76.5%

**Please note:**  
Past performance is not a guide to future performance. You should be aware that the value of investments may go up and down and you may receive back less than you invested originally. Investment in these funds is not suitable for everybody; please consult an adviser before making a decision to invest. The specific details of the funds including investment policy, charges and the particular risks associated with the funds are explained in the Key Investor Information Documentation (KIIDs) – these is available via the 7IM website. This document is not intended as a recommendation or financial advice.