

PRESS RELEASE



FOR IMMEDIATE RELEASE

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7IM builds on ESG offering with launch of Responsible Choice Model Portfolios

7IM has announced the launch of its Responsible Choice Model Portfolios, using its expertise in responsible and multi-asset investing to broaden its offering of ESG options for advisers and their clients.

The set of five portfolios, designed to cater for a range of risk profiles from Cautious to Adventurous, are aimed towards clients looking for a multi-asset option that incorporates a full range of responsible, ethical and sustainable principles.

Designed to help advisers provide the end solutions clients really want as the world moves towards a more sustainable future, the portfolios are focused on investments that score well on ESG factors and minimise exposure to controversial activities like armaments, tobacco and thermal coal. Managed by 7IM's investment team, they also look beyond these factors, with a focus on investing in companies that can have long-term positive impacts on society and the environment.

The portfolios share the same investment underpinnings as the rest of 7IM's portfolios and funds, including its Strategic Asset Allocation (SAA) and risk management processes, which have delivered strong performance over the past 18 years.

The 7IM Responsible Choice Model Portfolios will charge an annual management fee of 0.30%, with the ongoing charges of underlying holdings of around 0.40%. The new models are currently only available on the 7IM platform but will be available on third party platforms in the near future.

The launch complements 7IM's track record and proven performance within the responsible investing space, with its Sustainable Balance fund having achieved top quartile performance over 14 years.

Verona Kenny, Managing Director of Intermediary at 7IM said: "The industry has gone ESG mad, we have been ESG mad for the last 14 years. 14 years after launching our top performing Sustainable Balance fund, we are really excited to be now completing our ESG range with the 7IM Responsible Choice Models. These models cover the full responsible investment spectrum."

"Green recovery and governance issues are quite rightly high on the global agenda, and the 7IM Responsible Choice Model Portfolios are designed to embrace the opportunities here and offer advisers an avenue to invest along sustainable lines, without having to sacrifice performance*."

Terence Moll, Head of Investment Strategy at 7IM said: "At 7IM, we're passionate about incorporating ESG values into the work that we do. Rather than having separate ESG or stewardship team to focus on issues of sustainability, we believe that ESG matters should sit within the heart of investment teams."

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“These new portfolios build on our 14-year track record in sustainable investing, and when combined with 7IM’s successful multi-asset investment process, offer a robust and responsible solution for investors looking to build a better future.”

**Please note: Past performance is not a guide to future returns*

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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 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.