

PRESS RELEASE



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7IM works with fintech Tikker - supporting advice firms with operational resilience

7IM today announces the next phase of its work with fintech Tikker as part of its multimillion-pound and multi-year investment into its award-winning proprietary platform and supporting technology. The investment forms a key pillar of its strategic growth plans and commitment to providing unrivalled services to advisers and clients.

Manual portfolio rebalancing has long been a time-consuming and error-prone process, often requiring multiple inputs across platforms and risking delays that can impact client outcomes. In a post-Consumer Duty landscape, this inefficiency is no longer acceptable.

Tikker provides a portfolio automation tool that streamlines the rebalancing process, reducing it from what can take days to just a few minutes. Through the software, 7IM's model portfolio managers and delivery teams can now use a single upload to rebalance 7IM's portfolios across its platform and multiple platforms if needed. This includes asset allocation changes, reweighting, digitally enhanced checks and audit trail creation.

Tikker saves the business valuable time, enhancing operational resilience by eliminating risk through data errors. Previously, portfolio managers had to manually input individual trades across multiple dealing points on the platform and then replicate these across different platforms. The time taken between making an adjustment and executing it could span multiple trading windows. From a Consumer Duty and fair outcomes perspective, this introduces operational inefficiencies that modern infrastructure like Tikker is designed to eliminate—ensuring timely, accurate execution and better alignment with clients' best interests.

7IM started work with Tikker last year as one of its founding design partners to improve efficiencies and automate the MPS market to help support advice firms.

Darren Fancourt, head of operations at 7IM said: "It's been incredibly exciting working with Tikker on a genuinely innovative solution that will make life much easier for MPS providers. It saves them time and removes the risk of human error but crucially, it means rebalancing processes can be carried out in a single trading window which delivers fair and better outcomes for clients too."

Tom Whittle, founder of Tikker, said: "It's great to be working with a highly respected wealth manager with the same shared values and an appreciation of the potential for technology to challenge inadequate and outdated systems. Tikker is removing the all-too-British queue from portfolio rebalancing, so every investor enjoys fair and equal outcomes. In a post RDR and Consumer Duty world, the discretionary portfolio market infrastructure is just too complex, inefficient, and prone to errors and risks. We're excited to be tackling this problem, and in turn supporting platforms in making life easier for their clients and being able to make rapid market adjustments to improve outcomes for end investors."

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Notes to Editors:

About 7IM

At 7IM, we want to deliver an unrivalled experience for all of our clients – whether that’s individuals, families, or businesses.

For financial advisers and planners, this involves us standing alongside them to support them with whatever they need, so they can focus more on what really matters: nurturing their relationships with clients to deliver on their financial plans. Our offering for advisers reflects that: an open architecture platform, multi asset investment solutions to fit whatever their investment philosophy is and help with discretionary investment management.

For our private wealth clients, it all starts with understanding the client, their families, and their goals and then creating a bespoke financial plan designed to help them achieve financial freedom.

We use cutting-edge technology to help make things simple and clear, but what really sets us apart is our real, honest, human service. No automated helplines or chatbots. You’ll always talk to a person.

Today, from our offices in London and Edinburgh, our team of approximately 600 talented people are entrusted to manage over £24 billion (as at January 2024) for a range of clients, including individuals and families, financial advisers, corporates, charities, and trustees.

In January 2024, Ontario Teachers’ Pension Plan, a global investor with net assets of \$255.8. billion (as at June 30 2024), acquired a majority stake in 7IM.

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. Registered office: 1 Angel Court, London EC2R 7HJ. Registered in England and Wales No. OC378740