

FOR IMMEDIATE RELEASE

4 MAY 2017

## RESULTS OF SEVEN INVESTMENT MANAGEMENT LLP (7IM) FOR THE YEAR ENDED 31 DECEMBER 2016

- Growth in assets under management (AUM) to £10.9bn, an 8% increase compared to 2015
- Increase in profit to £18.6m, up 3% on 2015
- 7IM Platform assets under management increase 24% during 2016 to £3.9bn
- Decade of continuous growth in assets under management

	2016	2015
Assets under management (AUM) (£bn)	£10.9	£10.1
Profit before tax and partners remuneration (£m)	£18.6	£18.1

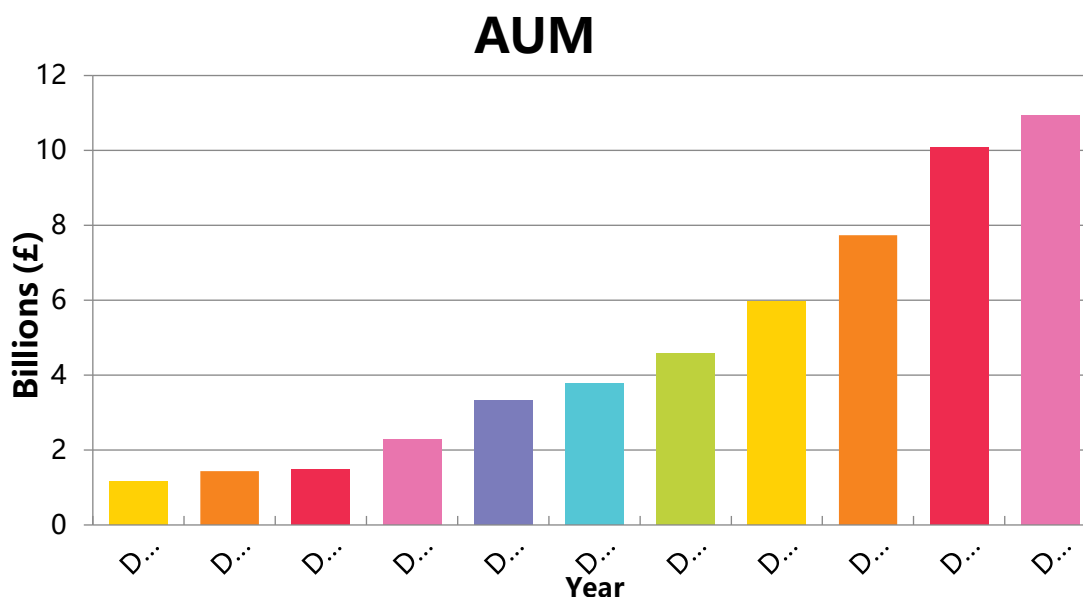
**Tom Sheridan, Chief Executive Officer, Seven Investment Management (7IM)** said:

“After a period of rapid expansion, with assets under management growing each year, we closed 2016 in a strong position to move forward. Platform assets under management were up 24% on the previous year. We also saw client numbers grow by 7%, adding 1,173 new accounts - a testament to our award winning service. Assets under management for our discretionary fund management service also continued to grow. Our retirement from running institutional money meant a loss of £340m assets. Continuing our product enhancements, 2016 also saw the relaunch of the 7IM fund range based in Dublin, which are now marketed under the banner of the 7IM Dublin Funds.

“We continue to invest in technology in a way that puts advisers and investors firmly in the driving seat. Last year, we increased our annual ongoing expenditure by £2.5m on platform and IT development and during 2016, we released ‘My Future’, a cashflow modelling tool for our award winning app, 7IMagine, allowing investors and planners to plan for long term financial goals. We are excited about the continued enhancements planned for 2017. Caledonia Investments, our shareholder since 2015, continues to be a huge supporter, with a long term approach to managing money that entirely matches our own.”

**Tom Sheridan** continued: “Fifteen years since our launch, we remain true to our original premise of managing money, and risk, to ‘expected returns’ over the medium to long term. It’s a strategy which we have delivered on, with asset allocation behind everything we do, and our ability to manage currency risk also proving helpful. Our multi asset, global approach, blending both active and passive strategies, continues to help us manage the risk–reward trade off at a time when geopolitical tensions make a ‘risk off’ strategy, for us, currently more attractive.”

## Decade of growth:



## Ends

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## Notes to editors

### About Seven Investment Management:

7IM provides investment services to professional wealth managers, planners, advisers and investors. These include:

- Discretionary investment management with advice
- A range of multi-asset portfolios
- An investment and open architecture trading platform
- A fantastic app, 7IMagine, to bring the client portfolios to life.

### 7IM – a story of Continuous Innovation

Since 7IM launched back in early 2002, it has pioneered a continuous stream of developments regarding how investment services are provided and charged for. We could just provide a list of our awards but actually think it is more useful to tell you what we have done and what we have provided for clients and their planners - and there is still more to come.

January 2001 – First Sterling Online Wrap Account launched with ongoing Asset Allocation

January 2003 – First White Label live

January 2004 – 7IM OEIC live

July 2005 – 7IM Platform live

Seven Investment Management LLP is authorised and regulated by the Financial Conduct Authority. Member of the London Stock Exchange.

Registered office: 55 Bishopsgate, London EC2N 3AS. Registered in England and Wales No. OC378740.

September 2005 – New 7IM Income Fund launched  
February 2007 – 7IM Sustainable Balance Fund launched  
December 2007 – 7IM gains its own FSA authorisation and new institutional investors  
January 2008 – 7IM joins the London Stock Exchange  
March 2008 – 7IM launches the AAP (Asset Allocated Passives) range of funds  
October 2009 – 7IM introduces 3rd party multi manager funds into the DFM service  
October 2009 – 7IM Personal Injury Fund launched  
April 2011 – 7IM launches enhanced, 'on-demand' client reporting  
January 2012 – 7IM Unconstrained Fund launched  
June 2012 – 7IM launches Fixed Term Deposits  
January 2013 – 7IM launches Asset Backed Lending  
March 2013 – '7IMagine' launched  
June 2013 - Assets under Management pass £5bn  
October 2013 – 7IM launches preferred SIPPs with DP Pensions Ltd and Carey Pensions UK  
October 2014 – Assets under Management pass £7bn  
January 2015 – Assets under Management pass £8bn  
March 2015 – In partnership with AXA Wealth, 7IM announces preferred Offshore Bond offering  
June 2015 – Assets under Management pass £10bn  
February 2016 – 7IM launches My Future, a new feature of the 7IMagine app, which allows advisers and clients to enter the details of their existing savings and pension contributions, as well as spending expectations in retirement to identify when their cash will run out.  
August 2016 – 7IM launches a Windows version of the 7IMagine App which allows 7IMagine to be used on all Windows devices including Microsoft Surface Pro, Windows phones and PC's.

**WWW.7IM.CO.UK**