

PRESS RELEASE



FOR IMMEDIATE RELEASE

25 JULY 2024

7IM once again confirmed as Signatory to the UK Stewardship Code

7IM announces today it has once again been named as a Signatory to the UK Stewardship Code by the Financial Reporting Council (FRC).

The UK Stewardship Code sets high stewardship standards for those investing money on behalf of UK savers and pensioners, and those that support them. Stewardship is the responsible allocation, management and oversight of capital to create long-term value for clients and beneficiaries leading to sustainable benefits for the economy, the environment and society.

As a signatory since 2021, this recognition from the FRC is testament to 7IM's commitment to making a positive impact on markets and on society through an integrated approach to investment strategies that encompass rigorous risk assessment practices.

In recent years, 7IM has partnered with numerous industry specialists to develop key business sustainability practices across pillars that include its commitment to: Cleaner Investments, Sustainable Choices, An Inclusive Team, and Giving Back.

7IM has also significantly enhanced its approach to Environmental, Social and Governance (ESG) over the years, integrating ESG components across all stages of the investment process: Strategic Asset Allocation, Tactical Asset Allocation, Portfolio Implementation, and Investment Risk. Recent enhancements include climate scenario analysis, enhanced manager due diligence, and collaborations with other industry stakeholders.

Over the past year, 7IM has undergone significant ownership and senior leadership changes. Ontario Teachers' Pension Plan Board (Ontario Teachers') acquired a majority stake in 7IM in January 2024. The strong cultural alignment between 7IM and Ontario Teachers' has reinforced 7IM's dedication to sustainable business practices and further facilitates positive outcomes for clients.

Signatories of the UK Stewardship Code must submit their stewardship practices, policies and activities, as well as their outcomes over a 12-month period through an annual report. 7IM's 2023 Stewardship Report can be found on [this page](#).

Martyn Surguy, Chief Investment Officer, said: "7IM focuses on consistently delivering the best outcomes for its clients, achieved through robust practices which have been built by our investment, sustainability, and risk experts and leaders.

"At 7IM, we believe it is our collective responsibility to manage resources wisely, uphold ethical standards, and encourage sustainable outcomes for current and future generations.

"We are pleased to have again been recognised for our hard work as responsible stewards in our industry and we are proud to be among the best in class in providing clients and beneficiaries with solutions that enhance their capital while delivering long-term positive impacts to the economic, environmental, and societal ecosystem."

PRESS RELEASE



- Ends -

For further information, please contact:

Henry Chan
Head of Corporate Communications
7IM
Henry.Chan@7im.co.uk
020 3823 8696
07786 000 313

Notes to Editors:

About 7IM

The “7” in 7IM refers to the seven original founders of the business.

Their aim was to deliver steady returns over the long term, while keeping an eye on risk, using the best available technology. They wanted everyone to have access to the kind of service and expertise that institutional investors would expect.

Our team, client base and funds under management have grown steadily over the years. From our offices in London and Edinburgh, more than 500 talented people manage over £20 billion for a range of clients, including individuals and families, financial advisers, corporates, charities and trustees.

At 7IM, we provide 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, a range of retirement solutions, and a fantastic app, 7IMagine, which brings client portfolios to life.

In January of 2024, Ontario Teachers' Pension Plan Board (Ontario Teachers') acquired a majority stake in 7IM. Ontario Teachers' is a global investor with net assets of \$249.8 billion as at June 30, 2023.

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. Financial Services Firm Reference Number 589124. Member of the London Stock Exchange. Registered office: 1 Angel Court, London EC2R 7HJ. Registered in England and Wales No. OC37874