PRESS RELEASE

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7IM enhances its platform to ease portfolio management burdens

7IM is announcing several upgrades to its platform, which will streamline the experience processes for advisers when managing a client's DFM model portfolios.

Functionalities updated include:

DFM models screen – A new dedicated screen for managing model portfolios, allowing advisers to view which of their clients are invested in which models, how much is currently invested and when they started investing. An extension of this upgrade is the ability to link and unlink client portfolios to specific models.

Reports – Introduction of audit reports, detailing which clients have invested in a model portfolio. This feature significantly improves the speed of accessing historical client data, particularly for those bigger firms that look after a large number of clients.

Enhanced end-to-end digital journey – Data integration with the back office has been enhanced, allowing for a more detailed analysis of a client's model use.

These enhancements follow on from several other recent upgrades to the platform, which include upgraded client information for the 7IM SIPP and new features to the MIFID toolkit to help advisers with their 10% drop reporting and costs and charges requirements. They form part of our ongoing commitment to develop and improve the platform, based on adviser feedback.

Verona Kenny, Managing Director, Intermediary at 7IM said: "We are always looking for ways to not just ease the administration burden on advisers but also enhance the overall experience of using the 7IM platform. These updates to our platform will make it easier for advisers to manage their client's portfolios.

"These, and other updates we have made, come from listening to what advisers need. This continual feedback is what drives any enhancements we make. Overseeing our own technology makes us incredibly nimble at being able to prioritise and make changes quickly that can make our service to advisers as helpful and straightforward as possible."

7IM will continue to make additional functionality improvements throughout the year.

Ends

Notes to Editors:

Any reference to specific investments are included for information purposes only and are not intended to provide stock recommendation or investment recommendations to individual investors.

Past performance is not a guide to future performance and it's important to note that the value of your investments may go up and down, and you may receive back less than you invested originally.

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 over £19bn, 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.

Our funds

- Our Pathbuilder fund range, launched in 2020, offers clients a well-diversified range of passive funds that benefit from our robust Strategic Asset Allocation at a competitive price.
- 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 Plus Model Portfolio, 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 the **7IM Passive Model Portfolios**, a diversified range of passive multi asset model portfolios underpinned by our robust Strategic Asset Allocation (SAA) process. The Passive Model Portfolios differ from our traditional offering and are built purely using a streamlined version of 7IM's robust (SAA).

In 2020, we launched the 7IM Responsible Choice Model Portfolios, combining our experience and expertise in both responsible investing and multi-asset investing to provide clients with a range of ESG focussed risk rated model portfolios.

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.

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