

FOR IMMEDIATE RELEASE

30 April 2021

7IM sees record quarter as investors add over half a billion to platform

Inflows to the 7IM platform set another new record in the last quarter, with the business continuing to enjoy traction with advisers and their clients.

7IM saw total inflows of £624m in the first quarter of 2021, a new high and substantially above the previous £486m record flows added in Q4 of 2020, as new platform functionality makes 7IM even easier to do business with.

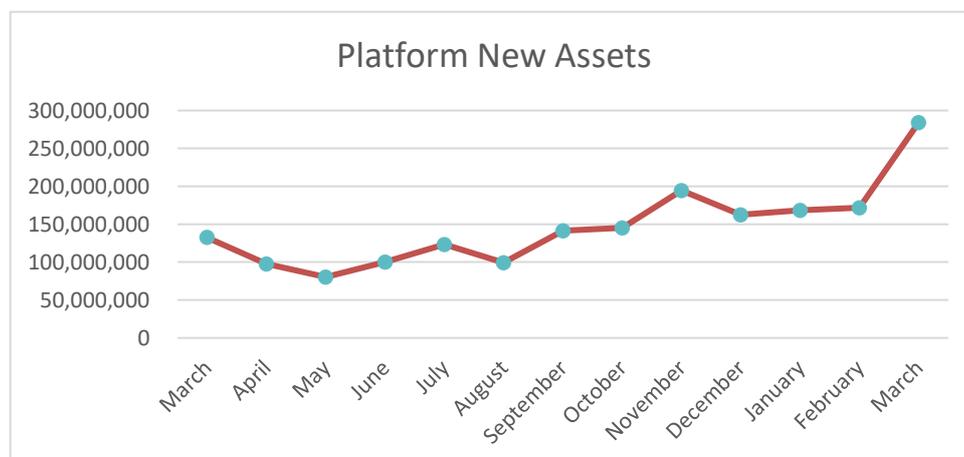
Gains throughout Q1 were largely driven by March Tax Year End inflows of £284m, a figure which exceeded the previous monthly record by more than £100m.

Over the past year, 7IM has continued to invest across its platform, launching a series of updates and enhancements in the latter half of 2020 to further improve the user experience and better support clients in a digital environment.

These include streamlining its application process with the adoption of e-sign and docu-sign capabilities, enhancements to investment instructions applying to transfers, any regular investments and cash, as well as improved family grouping reporting.

A range of different investment solutions also continue to attract investors. The latest platform inflows data from 7IM shows investment winners in the first quarter included a host of alternative assets, while all-in-one multi-asset portfolios were also popular.

Once again, pro-growth discretionary fund managers were also winners as advisers looked to resurgent global growth and sought ways to gain exposure for clients.



Source: 7IM

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Verona Kenny, Managing Director of Intermediary at 7IM, said: “We have been delighted to see a number of record-breaking months for inflows to our platform over the past year. As a provider our focus is always on finding new and innovative ways to improve the quality of service we can deliver to our clients and over the past year that has meant investing in the efficiency and functionality of our platform so as to allow them to adapt quickly and efficiently to a more digital world.

“Delivering great service means being able to evolve with the times. As we, hopefully, start to leave the worst of the pandemic behind us, we are continually looking at ways to remain at the cutting edge of delivering the best user experience for our advisers.”

Matthew Yeates, Head of Alternatives and Quantitative Strategy, said: “Record flows in the first quarter show that the pent-up demand for risk assets is starting to be unleashed, with a big surge in inflows as more advisers and their clients enter from the sidelines.

“Against a backdrop of rising inflation and resurgent global growth, advisers are no longer content to leave clients in cash lest they miss out on potential returns.

“Nonetheless, investors were also more divided in their views in the last quarter, with alternatives such as infrastructure and gold among the top ten alongside fixed income and equity mandates.

“A genuinely diversified multi-asset portfolio has a clear role in today’s prevailing environment of low bond yields, negative debt piles, and returning inflation,” he said.

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Notes to Editors:

*figures shown are for 7IM Holdings Limited

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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).

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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.