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7iM reports record net sales in Q2 as platform transformation accelerates

- Platform records best ever net sales of £0.54bn up 93% on Q1 2024
- Gross sales up 43% and surpass £1bn for second time
- Total Advised AUM up 18.24% (from Q1 24) to £17.41bn (Q2 25)
- Outflows fall by 21%

7iM reported its best ever net sales of £0.54bn in Q2 2025, jumping 93% since Q1 2024. Following Ontario Teachers' Pension Plan completing its acquisition of a major stake in the firm in Q1 24, it has embarked on a multi-million-pound and multi-year investment programme into its award-winning proprietary platform and supporting technology.

During Q2 gross sales surpassed £1bn for the second time (following Q4 2024). This represents a 43% increase since Q1 2024 resulting in an 18% increase in AUM to £17.41bn.

Compared to the previous quarter, outflows fell by 21% – significantly better than the market average, and fuelled, in part, by more advisers making use of the platform's Secured Lifetime Income product for clients looking for guaranteed income in a high-interest rate environment coupled with ongoing economic uncertainty.

As the business's major transformation programme gathers pace, it has recently announced the launch of automated pension transfers, a new next generation Online Reporting suite for advisers and a shift to a cloud-based system. All form a key pillar of the businesses strategy and commitment to delivering unrivalled service and experience to advisers and their clients.

Established in 2002, 7iM is a client-centric, technology-driven wealth and investment manager that manages approximately £23 billion of assets (31 August 2025) on behalf of more than 2,500 financial advisory firms and 7,000 private wealth clients across the UK. It seeks to cement itself as one of the leading vertically integrated players in the wealth management industry.

Russell Lancaster, Managing Director, Platform, and Intermediary Partnerships said:

"We've seen a really strong start to 2025 despite some uncertainty in the markets. The economic and political landscape means that the need for advice is stronger than ever, not least because of the proposed tax treatment of unspent pensions. We know through our engagement with advisers that firms are under increasing pressure to guide and deliver for their clients.

"We're fully committed to investing and innovating, delivering a broad range of products designed to meet client needs across different life stages and market conditions. We also have a clear focus on the adviser experience, ensuring our technology provides the best possible support. We're excited about the work underway – we're delivering on big priorities like automated transfers, and simultaneously we're continually making incremental changes where advisers tell us where they want us to adapt. There's more to come this year, all aimed at helping them with running businesses efficiently with technology they enjoy using."

Ends

PRESS RELEASE



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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 800 talented people are entrusted to manage over £23 billion (as at 31 August 2025) 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