

FOR IMMEDIATE RELEASE

5 July 2019

7IM'S SUSTAINABLE BALANCE FUND HITS £100 MILLION IN AUM

Following the launch of the inaugural London Climate Action Week this week, 7IM today announces that the 7IM Sustainable Balance Fund has just reached £100 million in assets.

The 7IM Sustainable Balance Fund is an actively managed fund run by the 7IM Investment Team with a balanced risk profile, invested in a range of global equities, bonds, funds and alternative investments within an Environmental Social and Governance (ESG) framework.

The fund is screened to include investments which exhibit positive ethical conduct and exclude those which are materially involved in ethically unacceptable conduct.

Launched in February 2007, the 7IM Sustainable Balance Fund has returned 67.7% since inception:

	30/06/2016		30/06/2014		30/06/2009		02/02/2007	
Sector/Fund	3 Yrs		5 Yrs		10 Yrs		Since Inception	
as at 30.06.19	Return	Difference	Return	Difference	Return	Difference	Return	Difference
IA Mixed 20-60% Shares	18.00%		25.90%		84.50%		59.10%	
7IM Sustainable Balance	20.00%	2.00%	34.80%	8.90%	92.40%	7.90%	67.70%	8.60%

Source: 7IM/Bloomberg/Financial Express, Total Return in GBP, Net of Fees.

Commenting on the milestone, **Camilla Ritchie, Senior Investment Manager at 7IM** said:

“Sustainable and ESG investing has come a long way in the past few years and we have witnessed a dramatic rise in demand for these strategies in the UK in recent months. As such, ESG investing has moved from being seen as a niche approach to investing and into the mainstream. This is underlined by the £100 million milestone we have just achieved in the 7IM Sustainable Balance Fund.

“With the introduction of initiatives like London Climate Change Week and as attitudes towards environmental issues continue to evolve, we expect flows into ESG focussed strategies to continue to rise.”

Ends

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Notes to Editors:

5 year performance:

	30/06/2019	30/06/2018	30/06/2017	30/06/2016	30/06/2015	30/06/2014
		1 yr	2 yr	3 yr	4 yr	5 yr
7IM Sustainable Balance Fund C Acc		4.44%	7.79%	20.04%	23.60%	34.77%
IA Mixed Investment 20%-60% Shrs TR in GB		3.01%	5.53%	18.04%	20.25%	25.92%

Source: 7IM/Bloomberg/Financial Express, Total Return in GBP, Net of Fees.

About 7IM

It all began in 2002, with seven of us in a basement establishing Seven Investment Management (7IM) because we couldn't find anywhere we wanted to invest our families' money. Our assets under management now stand at around £14.3bn, 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**. Some of these risk profiles have funds domiciled in both Dublin (with UK reporting status) as well as the UK.
- 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**. Again, some of these risk profiles have funds domiciled in both Dublin (with UK reporting status) as well as the UK.
- 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**.
- We also have a range of ‘smart passive’ funds known as the equity value funds. The range includes: the **7IM UK Equity Value Fund**, the **7IM US Equity Value Fund**, the **7IM European (ex. UK) Equity Value Fund** or the **7IM Emerging Markets Equity Value Fund**. These are entirely systematically managed based solely on company fundamentals, the aim being to outperform the relevant passive market cap-weighted alternative by selecting profitable, high-quality, cash-flow generating companies that trade at a discount to their intrinsic value.

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**.

The 7IM funds and Model Portfolios are available through the 7IM Discretionary, Platform, and Self Invest services, 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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