

FOR IMMEDIATE RELEASE

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7IM launches ESG Calculator for advisers

7IM has today announced the launch of a new interactive Environmental, Social and Governance (ESG) Calculator to help advisers better illustrate the sustainable impact of their investment choices to their clients.

Demonstrated in real terms – such as the equivalent of return flight trips from London to Tokyo or tumble dryer cycles – the calculator shows the equivalent reduction in carbon between 7IM’s Responsible Choice model portfolios and Sustainable Balance fund, compared to an investment in a global equity index.

The tool has been developed with both advisers and their clients in mind, creating an interactive experience which shows the user the carbon reduction of the investment in real life terms.

For example, a £100,000 investment into 7IM’s Responsible Choice Balanced model portfolio over a 12-month period, could be illustrated as a comparative carbon reduction equivalent to 29 car trips from London to Edinburgh or 2,463 kilos of avocado grown, ripened and transported.

Advisers will be able to share the tool directly with their clients or, if they prefer, have the option to produce a report that can then be shared with them.

The latest development comes as part of 7IM’s broader sustainability strategy, which has seen the firm leverage its expertise in responsible and multi-asset investing to launch a range of responsible model portfolios.

7IM has also formed two sustainability committees; the Culture and Sustainability Committee; and the ESG Investment Committee. The former is responsible for the oversight of the firm’s ESG activities and ensuring its commitments are met, including its target to reduce CO2 emissions by 20% and become carbon neutral from 2021.

The ESG Investment Committee takes ownership of the implementation of ESG factors into 7IM’s investment process, which includes the integration of ESG data, and allowing them to observe how carbon emissions are impacted by the tactical adjustments made to portfolios.

In addition to the two sustainability committees, 7IM has established a Diversity and Inclusion Committee, which champions initiatives that aim to make the company a more inclusive employer.

Verona Kenny, Managing Director of Intermediary at 7IM commented: “Consumer interest and appetite around ESG solutions has boomed in recent years, yet confusion around product types and areas such as impact vs. return is still widespread.

“As a partner to our advisers, we see our role not just in providing underlying investment solutions that can cater to this appetite, but in assisting in all aspects surrounding this topic and helping advisers communicate what good can and should look like when it comes to ESG. We hope that by developing new tools such as our ESG Calculator, we can help advisers cut through some of the noise around ESG, and allow clients to better understand, not just the different options available, but the real-world effect of choosing to invest in a more sustainable way.

PRESS RELEASE



“With this in mind, we have focused on developing something that would not just make this a more interactive process for financial advisers, but for their clients too.”

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For further information, please contact:

Henry Chan
Head of Communications & Content
Seven Investment Management
Henry.Chan@7im.co.uk
0203 823 8696
07786 000 313

Notes to Editors:

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 £18bn, 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 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.

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- 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.