

PRESS RELEASE



FOR IMMEDIATE RELEASE

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7IM partners with Door to strengthen regulatory and stewardship strategies

7IM today announces that it has partnered with Door, a company dedicated to improving due diligence processes, in a move that will assist the firm in optimising its investment research process as well as enhance its stewardship strategy.

7IM will be utilising Door's technology to receive information and streamline, digitise and optimise its process for due diligence and research on its asset managers and their investment products.

The adoption of this technology will ensure the robust gathering of information, critical for managing risk and supporting research on important issues, such as governance and sustainability.

Uwe Ketelsen, Head of Portfolio Management at 7IM, commented: "Digital transformation is a high priority for 7IM, and we believe standardisation benefits all industry participants. We believe that Door can help the industry in this endeavour.

"Door is our preferred gateway to our due diligence teams, assisting asset managers in their support of our own research and risk management processes."

Founded in 2002, 7IM's ambition is to achieve steady returns over the long term, always with an eye on risk, and using up-to-the-minute technology.

It leverages evolving technologies and increasingly depends on using high-quality data and information management to support its regulatory response and wants to maintain the appropriate systems and controls to continue to improve operational resilience.

7IM also views its partnership with Door as a key step in its stewardship strategy, encouraging and supporting the asset management industry to provide complete and up-to-date qualitative information, and therefore helping investors conduct their analysis, and to provide timely updates where circumstances have changed.

Rob Sanders, Co-Founder of Door, added: "We are delighted that 7IM is joining its peers around the world to help transform the legacy due diligence process. Door is an industry utility that is helping both asset allocators and asset managers streamline the exchange of information."

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Door

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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.
- 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

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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.

About Door

Door is the leading, global digital interface used by professional investors to access up-to-date information for fund research and operational due diligence. Door streamlines the information exchange, saving asset managers' time, improving client experience and reducing investment risk. Door works with over 400 asset managers and manager research teams in 38 countries.