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25 August 2020

## 7IM ANNOUNCES RESULTS FOR THE YEAR ENDED 31 DECEMBER 2019

### Highlights:

- Increase in 7IM Group\* assets under management (AUM) of 9.2% to £14.56bn in 2019 (2018: £13.33bn)
- Group revenue increase of 5.2% to £70.9mn (2018: £67.4mn)
- Group profits before tax up 15% to £9.3mn (2018: £8mn)
- Over a decade of continuous growth in assets under management

7IM today announces another successful year of growth with increases in assets under management, revenue and profits before tax in 2019.

Contributing to the success in 2019 was the development and implementation of a refreshed company strategy and culture, as well as several senior appointments, including Dean Proctor as Chief Executive Officer, Duncan Walker as Chief Financial Officer and Chris Phillips as Chief Client Officer to lead the firm.

2019 also saw the launch of 7IM's innovative Retirement Income Service, the 7IM Select Funds and more recently the low-cost 7IM Pathway passive model portfolios.

**Dean Proctor, Chief Executive Officer, Seven Investment Management (7IM) said:**

“As I look back after just over a year in charge, it’s fair to say 2019 was a year of change. Yet despite all of the change, we have maintained our positive momentum and we have seen the business extend its track record of year-on-year growth.

“The key drivers of our continued success have been the refreshed strategy and culture introduced last summer, as well as the launch of several cutting-edge solutions - which have seen the business getting back to its roots of being a market challenger and an innovator.

“While 2020 has undoubtedly had its challenges so far, brought about by the COVID-19 crisis, I’m confident about the future of 7IM. We now have the right people, the right strategy and the right culture in place. We are also committed to investing more in our award-winning platform and launching new products to meet our clients evolving needs.

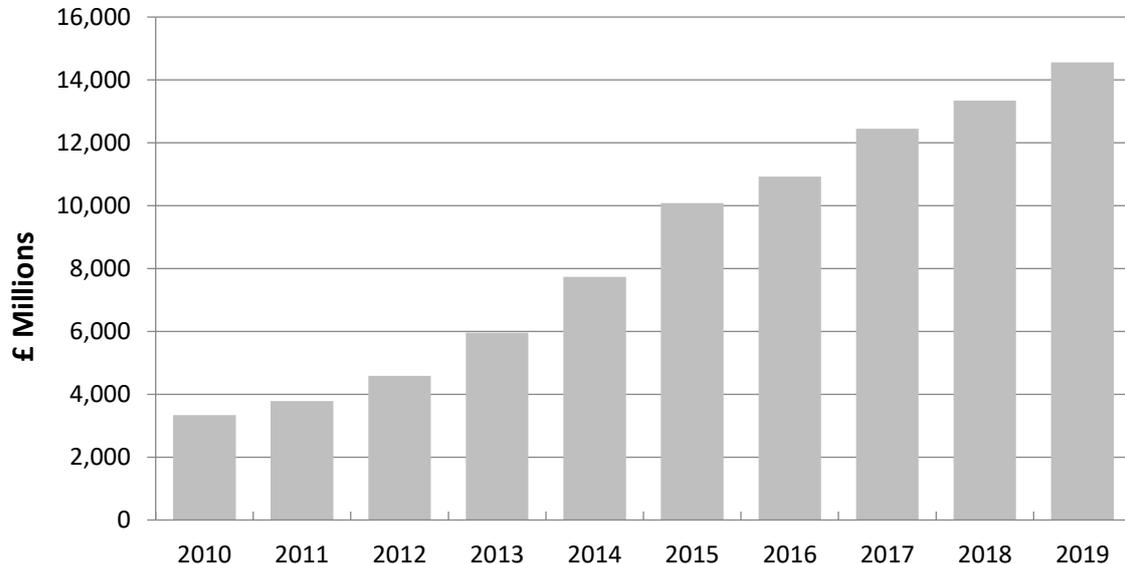
“With the above in mind, I do not see any reason why 7IM cannot emerge from this difficult period with a brighter and more positive outlook than when we entered it.”

### A decade of continuous growth

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## AUM



### Ends

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### Notes to Editors:

\*figures shown are for 7IM Holdings Limited

### 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 £14bn, and we have moved from 'basement' to 'Bishopsgate' in the City of London.

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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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**.

## 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).

The 7IM funds and Model Portfolios are available through the 7IM Discretionary and Platform as well as on other platforms.

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