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FOR IMMEDIATE RELEASE

14 May 2019

7 YEARS OF 7IM MODEL PORTFOLIOS

Seven Investment Management (7IM) celebrates the seventh birthday of its first model portfolios.

In 2012, when the Queen was celebrating her Diamond Jubilee and London was gearing up to hosting the Olympics, 7IM launched four passive model portfolios via Ascentric, the wrap platform.*

Since launch, all four model portfolios have delivered strong returns that are consistent with their risk profiles:

| Fund Name | 7 Year Performance to 31/03/19** |
|---|----------------------------------|
| 7IM Passive Adventurous Model Portfolio | 73.15 |
| <i>IA Flexible Investment</i> | 57.92 |
| | |
| 7IM Passive Moderately Adventurous Model Portfolio | 64.79 |
| <i>IA Mixed Investment 40-85% Shares</i> | 58.50 |
| | |
| 7IM Passive Balanced Model Portfolio | 53.56 |
| <i>IA Mixed Investment 20-60% Shares</i> | 41.64 |
| | |
| 7IM Passive Moderately Cautious Model Portfolio | 42.49 |
| <i>IA Mixed Investment 0-35% Shares</i> | 29.81 |

Today, 7IM offers a wide range of multi-asset model portfolios available onshore and offshore across the risk spectrum which can be accessed via a range of platforms.

Robert Hardy, Head of Intermediary Sales, 7IM said: "Since launching the first of the 7IM model portfolios seven years ago, they have grown to be very popular with intermediaries and their clients. And it's easy to understand why, not only have they offered consistent returns since inception but offer a cost-effective way for intermediaries to deliver a centralised investment proposition.

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“With our tried and tested approach, our suite of model portfolios has expanded to now include a variety of model portfolios - covering active, passive, onshore and offshore - to help meet the differing needs of advisers and their clients.”

Ends

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Notes to Editors:

* The 7IM Passive Adventurous Model Portfolio, 7IM Passive Moderately Adventurous Model Portfolio, 7IM Passive Balanced Model Portfolio and 7IM Passive Moderately Cautious Model Portfolio all launched on 12 March 2012 via Ascentric.

****Source:** 7IM/Financial Express – The 7IM model portfolios do not sit in the IA sectors and the comparative data is for illustrative and indicative purposes only

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.

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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.

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