

PRESS RELEASE



FOR IMMEDIATE RELEASE

24 May 2022

7IM CELEBRATES ANOTHER SUCCESSFUL YEAR OF GROWTH AS REVENUE SOARS 31.6% FOR THE YEAR ENDED DECEMBER 2021

Highlights:

- 7IM Group revenue increased by 31.6% in 2021, climbing to £92.3 million from £70.1 million in 2020.
- AUM rose by almost £3 billion to £21 billion as at 31st December 2021.
- Profit before tax almost doubled in 2021, coming in at £9.5 million against 2020's £5.2 million, an 83% increase.
- 2021 also saw the successful integration of both Partners Wealth Management LLP and Find A Wealth Manager Ltd, as the group surged onwards with its ambitious growth plan.

7IM today announces another year of strong performance, with significant growth in revenue, assets under management (AUM), and profit before tax in the year ended December 2021.

	2020	2021
Group Revenue	£70.1mn	£92.3mn
AUM	£18.3mn	£21bn
Profit Before Tax	£5.2mn	£9.5mn

A key contributor to 2021's success was the successful integration of Partners Wealth Management LLP (PWM) and Find a Wealth Manager Ltd, who continue to operate as distinct and independent companies from 7IM.

Throughout the year, 7IM made a number of strategic changes to its solutions to benefit its clients. It also added the 7IM Pathbuilder 4 Fund to its Pathbuilder fund range, a group of passive, low-cost options that have been designed to complement the firm's existing highly diversified multi-asset strategies.

As part of 7IM's commitment to sustainability, and in response to the growing demand for sustainable solutions from its Private Clients, 7IM expanded its responsible investment proposition with the launch of the Responsible Wealth Model Portfolios in December 2021. The range offers clients a range of responsibly invested solutions across a range of risk profiles.

7IM's efforts were once again recognised last year. Our market-leading platform was awarded a Gold service rating from Defaqto, who also awarded us with consistently strong ratings across our other product ranges. Our Model Portfolio Service was given a 5 Diamond Rating, as was our 7IM Sustainable Balance Fund.

Commenting, **Dean Proctor, Chief Executive Officer at 7IM**, said: "Looking back at 2021, it's abundantly clear that it was another year punctuated by change and challenge as Covid continued to disrupt all our lives. Yet, despite all the change and challenges of last year, I'm immensely proud that, as a firm, we have been able to continue to deliver on our strategic initiatives and support the evolving needs of our clients. This, in turn, has helped 7IM to deliver another year of strong growth, as evidenced by our latest financial results.

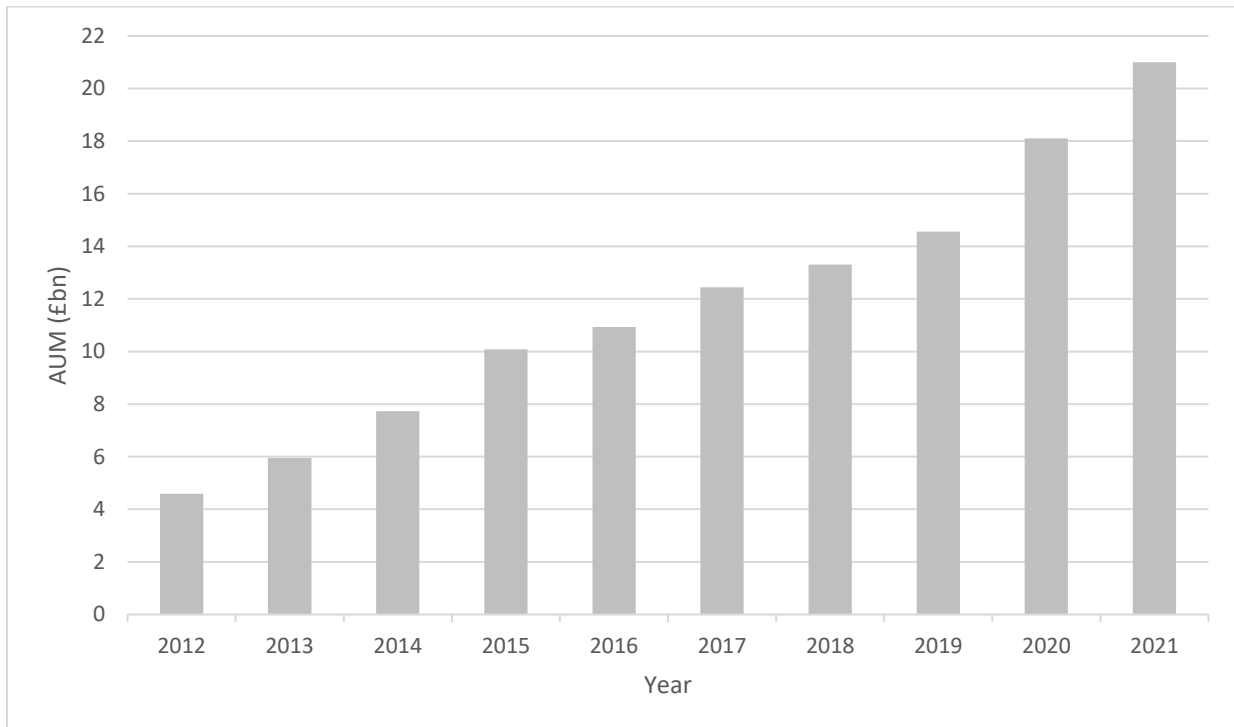
"Much like last year and the year before, 2022 is likely to be characterised by further change as we continue to adapt to soaring living costs and as the truly heart-breaking humanitarian crisis in Ukraine

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rumbles on. However, while the world around us continues to change, our focus at 7IM remains the same as when 7IM was first founded 20 years ago – and that is to put our clients' interests at the heart of everything we do. To achieve this, our strategic priorities for 2022 centre around continuing to invest in our people, technology and digital services, and our sustainability endeavours so we can deliver an unrivalled experience to our customers, clients and partners.”

A decade of continuous growth



Ends

Notes to Editors:

Any reference to specific investments are included for information purposes only and are not intended to provide stock recommendation or investment recommendations to individual investors.

Past performance is not a guide to future performance and it's important to note that the value of your investments may go up and down, and you may receive back less than you invested originally.

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 £20bn, 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.

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

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.